



Making sense of 'intersectionality'

A manual for lovers of people and forests

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RESEARCH
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Photo by Ulet Ifansasti/CIFOR

Yordana Yawate carries a sack of sago pith as her husband Silas Matoke harvests sago known as 'pangkur' on the banks of the Tuba River in Honitetu village, West Seram Regency, Maluku Province, Indonesia.

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Glossary

| | |
|-------------------|---|
| ACM | Adaptive Collaborative Management |
| agency | The capacity of individuals to act independently and to make their own free choices (see Klein 2016 for further nuancing of the concept). |
| CFUG | Community Forestry User Group |
| CIFOR | Center for International Forestry Research |
| constructed | Created and expressed through cultural or social practice. |
| deconstruction | Critical analysis that examines language and conceptual systems, relations and meaning, and assumptions implicit in the expression of ideas. |
| embodied | The ways people incorporate biologically the social and material worlds in which they live. |
| endowments | Assets. |
| heteronormative | Denoting or relating to a worldview that promotes heterosexuality as the normal or preferred sexual orientation. |
| identity politics | Efforts to mobilize people from a specific marginalized group to confront and alter narratives about their inferiority or other oppressive characterizations, with the intent to liberate themselves. |
| intersectionality | The influences of multiple identities in a person as these interact with marginalizing and empowering structures, norms and narratives. |
| LGBTQ | Lesbian, gay, bisexual, transgender and queer |
| narratives | Stories that guide given communities to structure and assign meaning to past and present phenomena. Narratives are developed and expressed through cultural and religious traditions, popular culture, media and science, as well as politics and development work. Narratives backed by different degrees and types of power compete to instill ideas about causal relations as well as moral values and ethical behavior. |
| norms | Social rules guiding individuals' actions within any social grouping. |
| performativity | The process whereby speech and communication consummate actions and contribute to identity formation. |
| positionality | Consideration of the metaphorical location where an actor or group stands in relation to others distinguished by ethno-racial, gender, class, geographical and other terms. The 'position' of an individual or group within intersecting systems of opportunity and adversity relates to their 'strategic interests' in relations of difference and power involving decision making or control over resources. |
| power | Capacity or ability to direct or influence the behavior of others or the course of events; and to have a say in the conduct of one's own life. |
| reflexivity | Self-analysis and revelation helpful to a reader in interpreting the positionality (and thus some of the biases and assumptions) of a researcher; also the process whereby a researcher analyzes his/her own biases. |
| SDGs | Sustainable Development Goals |
| subjectivity | The set of processes by which a subject or self is constituted, usually in relation to others, including attitudes, values, expectations, memories and dispositions. |

| | |
|---------------|---|
| transmigrants | Families transported to Indonesia's Outer Islands as part of a longstanding and formal resettlement program. |
| UNDP | United Nations Development Programme |
| WEAI | Women's Empowerment in Agriculture Index |
| worldview | A culturally specific understanding of and assumptions about how the world functions, including all dimensions (social, environmental, aesthetic, spiritual, etc.). |

1 Introduction

This manual has been prompted by several factors: primary among them is the discovery among forestry professionals that research on gender and equity has relevance for their own work. But gender specialists have also come to realize that analyses of gender and equity in forests have sometimes been overly static, stereotypical and superficial. Although studies of the division of labor, norms about gender roles, access to land and other assets, and forest use abound, we have not yet adequately addressed the power relations¹ and institutional structures that (a) inhibit certain women's (and others') ability to lead productive and satisfying lives and (b) on a broader scale, often interfere with good and equitable forest management.

Many feminist scholars have argued both that women (and men) are differentiated by class, ethnicity, age, etc. *and* that women experience varying degrees of gender-based discrimination merely by virtue of being women in a patriarchal world. We have argued that discrimination – along with its disempowering effects – may take various forms depending on one's position in structures of race, class, caste, etc. Inequalities are seldom the result of a single factor, but rather “the outcome of intersections of different social locations, power relations and experiences” (Hankivsky 2014, 2). Simplistic and stereotypical narratives, particularly those that dichotomize mainstream men versus mainstream women, may serve to render the variety of differences invisible (e.g. Demetriades and Esplen 2008), and instead force complex social realities into a binary gendered model. They may also offer a static and binary understanding of gendered power relations, in which women, generally, are pictured as

¹ We have tended also to view power relations using binary, static and zero-sum conceptualizations, which consideration of intersectionality can help us to avoid.

Box 1. On gendered advantages and disadvantages

Arora-Jonsson (2011) discusses a popular claim that women are 14 times more likely to die in natural calamities than men. Women's higher poverty rates, restricted mobility and cumbersome clothing are among common explanations for the figure. However, through examining studies on natural disasters and gendered mortality, Arora-Jonsson paints a more complex, contextual and nuanced picture, in which women's higher mortality rates correlated with existing patterns of socioeconomic discrimination. Socioeconomically disadvantaged women were more likely to die.

Vulnerability cannot be viewed solely as a function of gender, poverty and marginalization either.^a In India, upper-caste women's need to maintain 'honorable behavior' even in the face of danger can increase their vulnerability vis-à-vis women of lower castes. In Nicaragua, more men than women died during Hurricane Mitch due to masculinity norms encouraging risky and heroic behavior (as Eriksen (2013) also found among some Australian and North American women in danger from forest fires).

These studies clearly caution against simplistic assumptions and demonstrate the advantages of a more nuanced and contextual approach to understanding the dynamics of gendered vulnerability. The examples from India and Nicaragua also show that we cannot simply assume vulnerability and disadvantage only to be located at the point where most pre-defined marginalizing variables converge. A methodological and analytical framework for unpacking the enabling and disabling aspects of multiple identities and institutions in various contexts is therefore vital.

Note:

a The purpose of this manual is not to identify participants in what Djoudi et al. (2016) term 'vulnerability Olympics'. Instead, we seek to understand the interacting forces – personal and institutional – that contribute to power imbalances and other demeaning and destructive inequities.

Box 2. Hankivsky's definition of intersectionality

"Intersectionality promotes an understanding of human beings as shaped by the interaction of different social locations (e.g. 'race'/ethnicity, indigeneity, gender, class, sexuality, geography, age, disability/ability, migration status, religion). These interactions occur within a context of connected systems and structures of power (e.g. laws, policies, state governments and other political and economic unions, religious institutions, media). Through such processes, interdependent forms of privilege and oppression shaped by colonialism, imperialism, racism, homophobia, ableism and patriarchy are created" (Hankivsky 2014, 2).

disadvantaged vis-à-vis men. In reality, of course, each individual posits many intersecting identities, which in a given situation and context may be sources of both privilege and oppression (AWID 2004). Box 1 provides some examples of ways that different institutional and normative contexts can influence individuals' vulnerability to climate change differently.

Greater attention to intersectionality² – briefly, *the interacting influences of multiple identities in a given person as they interact with marginalizing or empowering structures, norms and narratives* – can provide nuance to our analyses in ways that allow us to move away from static, binary and simplistic conceptualizations of gender. Intersectionality provides us with analytical tools for studying and understanding the ways multiple identities intersect in various contexts and power structures (Hankivsky 2014), and "how these intersections contribute to unique experiences of oppression and privilege" (AWID 2004, 3). Such nuanced analyses will benefit forest people and forest management, as well as strengthen gender analysis itself.

Here, we build on the work of feminist scholars who have developed the concept of intersectionality³ and used it in their analyses. Such scholars have shown that focusing on gender alone is inadequate and indeed can misrepresent as much as it clarifies. But there remain serious uncertainties about how to take the concept of intersectionality into account, and how to seriously attend to clusters of identities that have different impacts on people's agency and on their lives.

We consider the concept applicable and useful in the forestry world. Our task here is to move an implicit recognition of intersectionality in much of our work (e.g. in CIFOR's Adaptive Collaborative Management research of the mid-2000s)⁴ to a more explicit and full-bodied version (e.g. Sijapati Basnett 2011; Li 2015; Djoudi et al. 2016).

We use several mechanisms to encourage more explicit recognition of intersectionality: a review of key intersectionality literature; the identification of five complementary and interconnected lenses through which intersectionality can be viewed; and suggestions for useful steps in conducting an intersectional analysis (recognizing that a standardized, cookie-cutter approach is not applicable). We supplement these mechanisms with ethnographic boxes, which provide examples of the functioning of intersectionality in a variety of contexts: from small villages to an international research center.

We designed this manual for use by those interested in more effectively incorporating gender and other equity concerns into forest management and research. Users are likely to include forest managers, biological and social scientists, nongovernmental organization (NGO) personnel, gender researchers and perhaps policymakers. We hope that the contents will facilitate more effective incorporation of the voices of the multiply marginalized in forest management and forest research, and in forest-related policymaking and other interventions. Our emphasis here begins with gender. But attending to intersectionality strategically recognizes the relevance of other social characteristics in rendering individuals more or less marginalized. Recognition of marginalization and the institutional mechanisms that maintain it

2 See Glossary before Part I for problematic terms that appear throughout this manual.

3 Intersectionality has variably been considered concept, theory, lens and methodology.

4 www.cifor.org/acm/

are important early steps in dealing more equitably and effectively with gender and other sources of vulnerability and useful contribution.

We have found it useful to begin with gender because it is the most ubiquitous of the many social differentiating variables.⁵ A gender focus grants access to all other marginalizing and empowering categories of social identity (youth, old age, handicap, non-heteronormative sexuality, despised ethnicity, lower caste, poverty and more) in a way that none of the other identities can. Most fundamentally, we are seeking, in intersectional analysis, a comprehensive framework that can help us capture the social dynamics of winning and losing in forest contexts. Intersectionality also allows us to raise the issue of multiple genders,⁶ and the social disadvantages associated with self-identification beyond the binary (man/woman), besides the various ways women can be marginalized.⁷ Neither the clusters of identities of an intersectional analysis nor the presence of atypical sexualities have been examined to any significant extent in forests. The former is important from the standpoint of effective and equitable forest management; the second, when we consider equity (though it may have greater forest-relevant implications as well – we just don't know).

This manual is organized into five sections, beginning with this Introduction (Part I). In Part II, we define and summarize key ideas in the history of intersectionality as a concept, as represented in the literature. We then propose five lenses through which we can approach intersectionality, as it relates to forests and forest peoples (Part III). We identify the five lenses – which reflect typical entry points of particular disciplines – by predominant characteristic: cognitive, emotional, social, economic and/or political. In any given context, all are likely to have relevance, but one can begin one's analysis from any of the five. In Part IV, we suggest six steps for researchers interested in conducting an intersectional analysis. These are: (a) understanding how the local system works; (b) identifying who the marginalized really are at the time of research/action and what institutions contribute to sustaining that marginalization; (c) estimating the level/significance of discrimination for individuals with multiple marginalizing identities; (d) analyzing how the institutions, norms and narratives function to sustain inequitable systems; (e) strengthening collaboration within and among community members to reduce adverse impacts on multiply marginalized individuals; and (f) changing policies and inequitable systems. Part V concludes the manual.

5 Care must be taken to avoid simply disaggregating data with ever-finer distinctions in search of the 'most marginalized'. This is not the point of an intersectional analysis.

6 Graham-Davies (2004), for instance, writes of the five genders of South Sulawesi, Indonesia.

7 See Wieringa (2015) for the marginalizing features of life for widows, divorcées and prostitutes in India and Indonesia.

2 Where does the term 'intersectionality' come from?

In the early 1980s, Women in Development (WID) specialists homed in on the then new understanding among development workers that many women were actively involved in activities with economic implications: growing crops, working for wages, producing or selling in the informal sector. This spawned an increase in WID researchers and practitioners and granted them a small voice in development efforts. But at that time, the development world was not ready to consider equity or intracommunity variation very seriously.

Although people's multiple identities have been recognized and described in ethnographies over the years, Crenshaw's (1989) work was the first to expand on this observation and label its functioning intersectionality. Crenshaw is a professor of law at the University of California, Los Angeles, and her professional emphasis is on civil rights in the United States, specifically feminist and antiracist policies. Her ideas on intersectionality emerged from a study of violence against black women in the United States. She found that generally efforts to combat racism there had focused on black men; and efforts to combat sexism had focused on white women; in both cases the most privileged of the marginalized within that category. These emphases rendered black women invisible. Her focus is specifically on the adverse impacts of a *combination* of marginalizing identities in interaction with related systems of oppression, domination or discrimination.

Crenshaw argues that the experience of a black woman cannot be derived from adding the sexism experienced by (white) women to the racism experienced by black (men). Rather, the experience of racism is surely different for black men and black women, for white men and white women, just as white women and black women may experience sexism differently. The unique way in

which black women's subordination is manifested and experienced in a racist and sexist society can thus not be adequately captured by regression analyses simply controlling for 'gender' and 'race'. As eloquently put by Hankivsky:

"Instead, intersectionality conceptualizes social categories as interacting with and co-constituting one another to create unique social locations that vary according to time and place. These intersections and their effects are what matter in an intersectional analysis" (Hankivsky 2014, 9).

Such intersectional identities are clearly visible in forest communities. Although few have examined elites in terms of intersectionality, we (and Yuval-Davis 2006; Lykke 2010;⁸ and Hankivsky 2014) consider such analysis likely also to bear fruit.

Crenshaw's ideas – and those that follow from her initial formulations – are intimately linked with issues of power. Most simply, and in lay terms, power is seen as the capacity or ability to direct or influence the behavior of others or the course of events. It also relates to one's ability to direct one's own life – a feature we consider intrinsically important (as do e.g. Hanmer and Klugman 2016; Kabeer 2016). Power is central to the idea of agency – something that tends to be ignored when considering the lives of people (e.g. women, the vulnerable) in forests. See Hanmer and Klugman (2016) for an excellent review of feminist literature on the definition and measurement of power. We have found Kabeer's (1999) discussion of power

8 Lykke (2010, 56) discusses a body of work called 'Critical Studies of Whiteness', for instance, which focuses on "analyses of racialized relations of dominance. This type of analysis will make visible how the unmarked 'white' norm is constructed instead of looking at the 'different' and 'racialized' other."

and agency to be both nuanced and useful in forested contexts:⁹

“In the positive sense of ‘power to’, [agency] refers to people’s capacity to define their own life choice and to pursue their own life goals, even in the face of opposition from others. Agency can also be exercised in a more negative sense of ‘power over’, in other words the capacity of an actor or category of actors to override the agency of others, for instance, through the use of violence, coercion and threat. However, power can also operate in the absence of any explicit agency. The norms and rules governing social behavior tend to ensure that certain outcomes are reproduced without any apparent exercise of agency” (Kabeer 1999, 438).

Klein reinforces Kabeer’s positive emphasis, noting:

“how power not only shapes the gendered environment, but also constitutes the subjectivity that contests this environment. Subjectivity is not just about domination and oppression; it also constitutes agency” (Klein 2016, 110).

Hankivsky highlights the insights from Guinier and Torres (2003):

“These relations of power include experiences of power over others, but also that of power with others (power that involves people working together) (Guinier & Torres, 2003)” (Hankivsky 2014, 9).

The idea of ‘power *with* others’ is particularly relevant for the many forest management groups that have sprung up around the world.

Following Foucault’s (1991) understanding of power, it is not permanently possessed by the privileged, but is also diffused and embodied in dominant discourses and structures. Power creates, ranks and reinforces social categories, through, for example, the social construct of ‘race,’ the process of racialization of groups and individuals, and enacted and experienced racism. As emphasized earlier, power is also relational. Depending on the time and context, a person

can experience both oppression and power. The focus of an intersectional analysis is thus not only to identify the dominant and the marginalized, but also to understand “the processes by which power and inequity are produced, reproduced and actively resisted” (Hankivsky 2014, 9). This requires consideration of institutional and normative contexts.

These ideas are most relevant in forest contexts when we consider four issues: (a) the ability of multiply marginalized people to direct their own lives; (b) the possibility of elites and others to inhibit or determine such people’s options; (c) the power of institutions and/or social norms and traditions to influence people’s beliefs, behavior and options (at all scales); and (d) the significance of one’s endowments in providing and constricting opportunities.

Although the term ‘intersectionality’ has become increasingly popular in feminist studies, it has not until recently been widely used in any explicit sense among those looking at gender and forests. Yet most feminists and students of gender understand, and many subscribe to its central tenets. Davis (2008, 77) maintains that its application remains “ambiguous and open ended”, which she interprets as positive features. Nash (2008) seems to dismiss intersectionality on the one hand calling it a ‘buzz word’, but then characterizes it as “the ‘gold standard’ multidisciplinary approach for analyzing subjects’ experiences of both identity and oppression” (Nash 2008, 2).

Lykke (2010) and Hankivsky (2014) have both provided useful analyses more recently. Lykke’s book, *Feminist Studies: A Guide to Intersectional Theory, Methodology and Writing*, provides a thorough (and dense) analysis of how intersectionality relates to the varieties of feminist theory and epistemologies.¹⁰ Hankivsky’s *Intersectionality 101* is a brief and accessible manual that summarizes the important concepts and uses, with an emphasis on the Canadian context.

¹⁰ Lykke (2010) explores in depth the intersectional implications of feminist empiricism (the one viewpoint that considers true objectivity a feasible goal), feminist standpoint epistemology (linked with identity politics), postmodern (anti-) epistemologies (rejecting “criteria for ... objective and value-neutral knowledge production”) and feminist post-constructionism (which builds on and goes beyond postmodern approaches).

⁹ See also Chambers (2006) or Ibrahim and Alkire (2007) for useful perspectives.

The literature on intersectionality offers three main conceptual approaches that we explore briefly here. Each approach provides useful insights. Crenshaw recognizes three types of intersectionality:

- Structural intersectionality. The intersection of race and gender means that women of color experience gender-based violence and policies aimed to remedy adverse conditions qualitatively differently from white women.
- Political intersectionality. Political movement, whether feminist or antiracist, has paradoxically rendered violence against women of color a marginal concern – as exemplified by the invisibility of black women, noted above. This is because feminism and the anti-patriarchy movement have been spearheaded by white women's interests, whereas antiracism has focused on inequalities experienced by black men.
- Representational intersectionality. Women of color are misrepresented in their cultural construction, thus exacerbating their disempowerment. This refers to the stereotypes and narratives about women of color that serve to further marginalize them (see the 'social' lens in Part III).

Leslie McCall (2014) has surveyed the growing body of literature on 'intersectionality' and identified three distinct conceptual approaches: *anticategorical*, *intracategorical* and *intercategorical* [our italics]. The first approach (anticategorical) avoids categorization altogether: proponents argue that the use of categories (e.g. black, female, poor, etc.)¹¹ can reinforce adverse behavior and stereotypes;¹² such categories suggest permanence where none may exist. See Escobar (1995) for

11 Keller (2015) and others have argued for strengthening our attention to the lesbian, gay, bisexual, transgender and queer (LGBTQ) individuals in rural areas (where forests tend to be) and for greater use of queer theory, which she summarizes thusly: "The queer theory framework has three overarching elements: The deconstruction of sex, gender and sexuality; performativity and its role in identity formation and as an alternative way of conceptualizing power; and the critique of sexual identity politics (Seidman 1996; Valocchi 2005)" (Keller 2015, 156). See also Lykke (2010) for extensive discussion of 'queerfeminist theorizing'. We have not seen consideration of gay forest dwellers, but imagine they do exist and surely suffer from this identity in some areas.

12 Yuval-Davis (2006) reminds us of Anderson's (1991) discussion of "the devastating effects the introduction of mutually exclusive census categories has had on colonial societies in which peaceful coexistence of communities often depended on categorical opacity" (Anderson 1991, 205).

arguments against the focus on 'the poor' for similar reasons. Although these are valid concerns, the approach seems somewhat impractical, given that human thought is based on categorization of sensory input. Still, the intracategorical approach's insistence on questioning and deconstructing categories and the normative assumptions that accompany them is useful. Such an approach also risks ignoring or even denying inequities along gender, caste, class or ethnic lines that marginalize certain people and not others. Dissolving such categories does not erase discriminatory structures and practices. It also raises questions about collective mobilization against discrimination. How do we mobilize against 'racism' or 'patriarchy' if we question the relevance of 'race' or 'gender'?

The second approach (intracategorical) seeks to capture the complexity and malleability of categories by a variety of mechanisms. Primary among these are in-depth cases ('deep description') and comparisons between multiply marginalized groups. Researchers using these methods:

"avoid the fully deconstructive rejection of all categorization, yet they remain deeply skeptical of the homogenizing generalizations that go with the territory of classification and categorization. The point is not to deny the importance - both material and discursive - of categories but to focus on the process by which they are produced, experienced, reproduced, and resisted in everyday life" (McCall 2014, 1783).

This suggests that attention be focused on the institutions and norms that replicate stereotypes and prejudicial images and narratives. Critics argue that such an approach can miss inter-group inequalities and/or overarching inequalities within which these groups are nested.

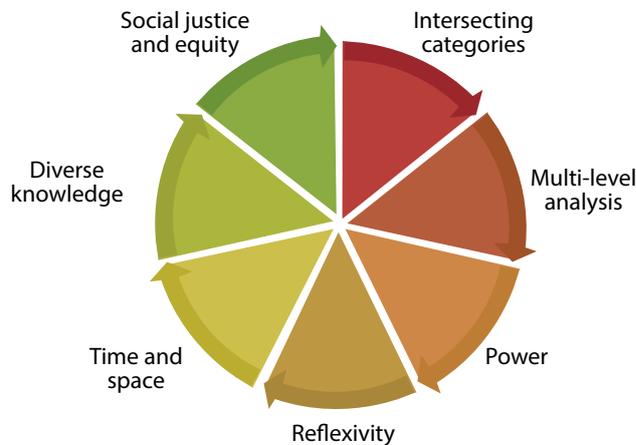
McCall (2014) herself prefers the third intercategorical approach, which makes strategic use of categories. This seems also to be feasible within the world of forestry research, though there remains a danger of relying on categories that are externally defined (at sub-national or broader levels). These can reduce actual local complexities, ignore histories of power and domination, and even pit pre-defined groups against one another.

Box 3 summarizes the approaches to intersectionality and their implications for research.

Box 3. Summary of Crenshaw and McCall's approaches

| Author | Approach | Overview of approach and main limitations | Application | |
|--------------------|------------------------------------|--|---|--|
| Kimberley Crenshaw | Structural intersectionality | The intersection of race and gender means that women of color experience violence and policies aimed to remedy adverse conditions qualitatively differently from white women. | Well-suited for in-depth case studies of social groups at the intersection of different categories, and exploration of how they experience marginality due to social relations and social movements in which they are situated. | |
| | Political intersectionality | Politics, whether feminist or antiracist, has paradoxically rendered violence against women of color a marginal concern – exemplified by the invisibility of black women. | | |
| | Representational intersectionality | Women of color are misrepresented in their cultural construction (stereotypes and narratives that further marginalize them), thus exacerbating their disempowerment. | | |
| Leslie McCall | Anticategorical | Proponents prefer to avoid categorization altogether, pointing to fluidity of categories rather than stability, and argue that uncritical use of categories can reinforce adverse behavior or stereotypes and suggest permanence where none exist. BUT avoidance of categorization cannot erase structural inequalities related to racism, sexism. | Well-suited for individual life histories to demonstrate how individuals' experiences are mediated by different social relations, life-cycle processes and personal agency. | |
| | Intracategorical | Focuses on both fluidity and stability of categories. Remains skeptical of homogenization/generalization. But accepts that categories are important insofar as they are imbued with meaning and have material implications. The emphasis is on processes by which social categories are produced, experienced, reproduced and resisted daily. BUT risks diverting attention from broader societal processes and structures causing the inequalities in the first place. | | Well-suited for in-depth case studies of social groups at the intersections of different categories. |
| | Intercategorical | Provisionally adopts existing analytical categories to document relationships of inequality among social groups and changing configurations of inequality among multiple and conflicting dimensions. While the intracategorical approach begins with specific social groups and works its way outward to identify the elements of race, class and gender, the intercategory approach instead begins analysis with these elements. | | Well-suited for macro, quantitative analysis; can be complemented with background research on key categories for more meaningful analyses. |

Box 4. Hankivsky's principles of intersectionality (adapted from Hankivsky 2014, 8–12)



| | |
|---------------------------|---|
| Intersecting categories | Refers to the idea that human lives cannot be reduced to single categories only, and policy analysis cannot pre-assume that only one social category is relevant. Social categories must be viewed as interacting and intersecting with one another to create unique locations that vary according to time and place. |
| Multilevel analysis | Concerned with understanding the effects between and across various levels in society, including macro (global- and national-level institutions and policies), meso (provincial- and regional-level institutions and policies), and micro levels (community, grassroots institutions and policies as well as the individual or 'self'). |
| Power | (a) Operates at discursive and structural levels to exclude some types of knowledge and experience; (b) shapes subject positions and categories; and (c) these processes operate together to shape experiences of privilege and penalty between and within groups. Power is relational, recognizing power over, power to and power with. |
| Reflexivity | Reflexivity acknowledges the importance of power at the micro level of the self and our relationships with others, as well as at the macro levels of society. Practicing reflexivity is to commit to ongoing dialogue about tacit, personal, professional or organizational knowledge and their influences on policy. Reflexivity can help transform policy when we bring critical self-awareness, role-awareness, interrogation of power and privilege, and the questioning of assumptions and 'truths' to our work. |
| Time and space | How we experience and understand time and space depends on when and where we live and interact. Within these dimensions of time and space different kinds of knowledge are situated, our understandings of the world are constructed, and the social orders of meaning are made. Privileges and disadvantages, including intersecting identities and the processes that determine their value, change over time and place. Thus, time and space are not static, fixed or objective dimensions and/or processes, but are fluid, changeable and experienced through our interpretations, senses and feelings, which are, in turn, heavily conditioned by our social position/location, among other factors. |
| Diverse knowledge | Power and knowledge are intimately connected to the extent that power operates at discursive and structural levels to exclude some types of knowledge and experience. Intersectional analysis calls for investigating how certain knowledge traditions are included, privileged or marginalized, and the social, material, psychological and political ramifications for different social groups. Including the perspectives and worldviews of people who are typically marginalized or excluded in the production of what constitutes 'knowledge' can disrupt unequal power relations. |
| Social justice and equity | Can be understood as a way of transforming how resources and relationships are produced and distributed so that all can live dignified and ecologically sustainable lives. Equity refers to fairness and justice with the objective of equalizing outcomes between more or less advantaged groups. |
| Resistance and resilience | These can disrupt power and oppression. Even from so-called 'marginalized' spaces and locations, oppressive values, norms and practices can be challenged. Collective action can destabilize dominant ideologies. Conversely, policies and discourses that label groups of people as inherently marginalized or vulnerable undermine the reality that there are no 'pure victims or oppressors'. |

Box 5. Resistance and fluidity in Nepal

Nightingale (2011) documents a community forest user group meeting, where a Nepali lower caste (*Dalit*) man, a relatively wealthy contractor, uses his new class status to claim the right to enter the house of the upper-caste family hosting the meeting – an action normally considered taboo in the community. While economic wealth and independence can create space for renegotiating non-economic social relations, Nightingale points out that in this instance the *Dalit* man's intention was not to upset caste hierarchies. Rather, he felt that his upward movement along the class axis had made him 'cleaner' than the other *Dalits*, whose socially constructed, caste-related 'uncleanness' (rather than their class status) was the grounds for their exclusion from the upper-caste family's home.

The third conceptual framework builds on the work of Hankivsky (2012; Box 4 describes her principles) and others. As mentioned earlier and like other theorists, Hankivsky sees intersectionality as the analysis of the unique social locations produced by the mutually transformative interaction of multiple social categories in various contexts (cf. Lykke 2009, 2010). Djoudi et al. (2016), analyzing intersectionality in forests, further emphasize the view (common in feminist writings) that intersectionality includes "the assumption that social categories (i.e. race/ethnicity, gender, class, sexuality and ability) are *constructed* and *dynamic*" (Djoudi et al. 2016, 1; italics added). They emphasize the malleability of social categories and the fact that they are not inherent. Scholars have shown how even gender and race are socially constructed and changeable.

Nightingale (2011) gives a nice example of resistance, along with the contextual, situational, fluid and constantly renegotiated and contested aspects of intersectionality (Box 5). The example

also clearly links to what Yuval-Davis (2006) calls the 'experiential' and 'intersubjective' forms of social divisions.

We find each of the conceptual approaches outlined above to be valuable; each provides a different way of looking at intersectionality. Crenshaw analyses the intersectional experience across three dimensions. McCall discusses three approaches to understanding and dealing with categories, and Hankivsky isolates eight principles of intersectionality.

As we contemplated their insights, we considered also how these might be applied in specific forested contexts with particular forest inhabitants. We considered the relevance of intersectionality for policymakers and forest managers. We sought wording and a conceptualization that would be comprehensible to a wide range of disciplines. We present what we hope is a practical framework – to supplement the ideas presented above – in the next section.

3 Five lenses through which to view intersectionality

We mentioned early on our sense that much research on people and forests includes implicit attention to intersectionality; and that our goal has been to make future research more explicit and systematic in its attention to this issue. In doing so, we propose five interrelated lenses for examining intersectionality as comprehensively

as possible. These five lenses can help us develop nuanced analyses of the ‘intracategorical’ world we want to understand and take into account, as well as rendering the dense and theoretical literature on intersectionality more accessible. The effects clarified through these lenses are all embodied in individuals; they interconnect and interact.

Box 6. Training session in Tanzania

I [Colfer] was one of two highly educated white women, who designed and implemented two weeks of training on rapid rural appraisal tools in a remote research station in central Tanzania. This CIFOR research was designed to implement collaborative forest management with local communities and other stakeholders at the landscape level. The trainees – government officials and practitioners from a local NGO – included seven men and sometimes one woman. In terms of race, position, education and access to funds, we, the trainers, represented powerful individuals (despite our gender) vis-à-vis the trainees.

My co-trainer and I recognized our own ignorance of local conditions and made repeated efforts to elicit the participants’ desires. We wanted to build on what they already knew, so we could tailor our curriculum accordingly. But the options we presented were met with silence. Despite repeated attempts, we failed utterly to get substantive feedback. In the end, we selected those tools we thought likely to be most useful, spent several days in the classroom teaching them and visited two villages so the participants could try them out. The trainees quickly grasped our lessons and the trials in the villages went well.

At the end of the workshop, we learned to our utter amazement that our ‘students’ had already been trained in and used most of the methods! When we asked why they had not shared this with us earlier, their reply was “We didn’t want to offend you.”

An intersectional analysis, after the fact, of this incident includes the following (relevant lenses in brackets):

- The students knew that our worldviews would differ from theirs, but did not know how. Avoidance of interaction was a sensible path. [cognitive lens]
- They feared us, as highly educated, white, professionals in charge of funds, and lacked the confidence to confront us. [emotional, economic and political lenses]
- They knew of narratives of disdain for rural backwaters, for poor people with lower educational attainments, for [‘lazy’, ‘violent’, fill-in-the-blank negative quality] black people whose English was imperfect. [social lens]
- They also recognized our capacity to stop the project, withdraw funds and judge them. They wanted to do well enough to preclude such results. [economic and political lens]

Such experiences are common, as national partners in international development or conservation efforts keep their thoughts to themselves in interaction with those defined as elite.

Indeed, one of the problems with much forest-related research has been the willingness to look through only one lens (usually the economic). Specifying five lenses is not designed to reinforce rigid disciplinary boundaries, but rather to show how one can start with one lens, and be led, by intersectionality, to the others. Nor do we propose that consideration of intersectionality will require exhaustive study through each lens. Different contexts and different research concerns as well as researcher capabilities will determine which lenses prove most relevant and useful in a given context.

These lenses can help forestry/agroforestry researchers to: (a) better understand local power dynamics; (b) identify marginalized social groups at the intersection of different social identities/categories; (c) see how local-level processes are a part of broader macro structures and relations; and (d) better identify options for addressing underlying inequalities by mobilizing action by the marginalized groups themselves and/or highlighting the changes needed in the 'rules of the game'.

The first two lenses (the cognitive and the emotional) are 'internal' to the individual; the next three (social, economic and political)¹³ emanate 'externally' or are imposed by other people, institutions and contexts. All five pertain to intersectionality and how it functions. Box 6 describes an example from Tanzania, with common inequitable processes revealed through these five lenses.

Some of the salient ways in which this example engages with Hankivsky's (2014) principles of 'intersectionality' include the following:

- Reflexivity: This was written by one of the trainers (and lead author here) by reflecting critically on her own experience of the intersecting identities that affect what happened – a process that is alien in many disciplines, but important for good analysis of intersectionality. We need to recognize our own parts in reproducing harmful practice and consider ways to avoid such harm.
- Intersecting categories: Multiple and intersecting ways in which the 'trainees' and 'trainers' were situated.

- Power: Asymmetries in power relations between the 'trainees' and 'trainers,' as the trainers were there to 'facilitate' learning but could also pull the plug on funding. Their social positions as 'Western-educated', 'white', representatives of the 'funding agency' also elevated them to the status of 'elites'.
- Diverse knowledge: All participants were aware of the diversity in their knowledge systems. Indeed, the 'training' and the rapid rural appraisal tools were explicitly designed to share knowledge in at least two directions.
- Time and space: The nature and locations of interaction between trainees and trainers, and with local people during the village case studies.
- Social justice and equity: The underlying theme in the case.

3.1 The cognitive lens

The cognitive lens is concerned with the way individuals in forest communities look at their world, both biological and social. Psychologists have studied thinking, feminists have studied subjectivities, anthropologists have described worldviews, and system dynamicists have tried to model them, using a variety of techniques from ethnography to ethnoscience to computer modeling. We do not propose that forest researchers conduct elaborate studies of cognition; but rather that we consider the ideas originally proposed in Colfer (1983).

People of lower status within a given community have to master greater cognitive complexity than do elites in order to become successful members of that society and/or deal effectively with outsiders (discussed below). Since the mind is not directly accessible, evidence regarding different worldviews must come from people's words, direct observations and communication between people. Communication plays a crucial role in the use and abuse of power (also noted by Lykke 2010). Many have noted that gaining access to the voices of the marginalized in forest contexts is difficult. Below, we put forth some ideas about how such communication functions to maintain inequities within communities; and how it is built on the respective cognitive requirements of elites vis-à-vis the marginalized. Enhancing local communities' agency will require more consideration of cognition and communication.

¹³ The terms used for these lenses are all 'shorthand'. We do not suggest that everything cognitive, emotional, social, economic or political is included in these 'lenses.'

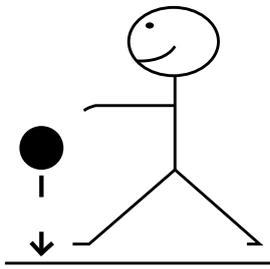


Figure 1. Colfer's (1983) analogy: the elite person's perspective

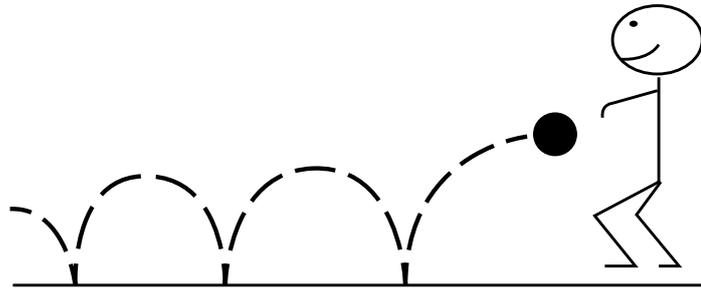


Figure 2. Colfer's (1983) analogy: the marginalized person's perspective

In 1975, E. Ardener was perplexed by what he termed the 'inarticulateness of women' in ethnographies. He concluded that if ethnographers preferred what men had to say, it was because men tended to give 'bounded models' of society. He and other contributors to S. Ardener (1975) wrote of 'muted groups' and 'counterpart models', all emphasizing the still common recognition that the marginalized display a certain inarticulateness and/or unwillingness to express themselves in some contexts.

Building on these ideas, Colfer initially interrogated three ethnographic cases: the Qashqa'i in rural Iran, a group of scientists at a professional workshop in Hawaii, and men and women in Bushler Bay, an American logging community.

Colfer's original (1983) article used the analogy of a bouncing ball as seen from the perspective of the bouncer (or the elite person). It goes up and down.

However, if it is seen on a moving train from a distance (as a marginalized person might see it), it arcs.

Similarly, social and economic realities are seen differently by differently placed individuals in social systems.

"In the most general terms, it seems that insofar as a low status person interacts regularly with people of higher status, low status people must understand and be able to operate in the system accepted by high status people. If regular and integrated interaction occurs, the cognitive situation of the lower status woman could be represented thusly:

$$\text{♀}(a_2) \neq (\text{♀}a_1)(\text{♂}a_{1,2})(\text{♀}b_{1,2})(\text{♂}b_{1,2}) \dots (\text{♀}n_{1,2})(\text{♂}n_{1,2})^{14}$$

On the other hand, if she can segregate her interactions, the relationship could be expressed thusly:

$$\text{♀}(a_2) \neq (\text{♀}a_1) + (\text{♂}a_{1,2}) + (\text{♀}b_{1,2}) + (\text{♂}b_{1,2}) + \dots + (\text{♀}n_{1,2}) + (\text{♂}n_{1,2})$$

In the above formulae, *a*, *b* and *n* refer to variant models; the subscripts 1 and 2 refer to the behavioral and cognitive aspects of the models respectively; and ♀ and ♂ refer to the sex of the actor. Each successive model in the formula (in this case, *a*, *b* through *n*) is the next superordinate social group's model, such that *n*_{1,2} is the highest, or most dominant, model extant. If this relationship holds, an obvious conclusion is that *the lower the status of a person, the greater the cognitive complexity required of that person to function adequately in situations of culture (or system) contact.*" (Adapted from Colfer 1983, 275; italics in original.)

Obviously, this proposition does not suggest that marginalized people are less *able* to function, but rather that *more is required of them* to function adequately than would be required of an elite person. 'Functioning adequately' could mean simply getting on with their lives, though excelling at dealing with multiple worldviews could open doors for moving up in the world or joining the elite.

14 This formula is slightly altered from the original.

Box 7. Adaptive Collaborative Management (ACM) meetings at CIFOR

The ACM team that led the global project from Bogor was composed of international staff and national staff, social scientists and biophysical scientists, and five nationalities. I [Colfer], an American woman, was team leader. My management style was inclusive and democratic, but I still struggled (rather unsuccessfully) both against the institutional division between national and international staff and against the more hierarchical worldview of my seven Indonesian colleagues.

Our 'rules of play' were established consensually, designed to increase participation in decision making.^a We used facilitation techniques (such as passing a stick to a person to elicit input; using 'yellow cards' to stop someone dominating the discussion, etc.). Performance appraisals at the end of the year encouraged further contribution by normally silent members.

But still, getting input from national staff was initially very difficult. There were reasons, reasons that recur in international forest-related settings at all levels and with many nationalities:

- Indonesian staff members, though all knew English, felt less able to express themselves articulately in this foreign language. [emotional, cognitive]
- Indonesian staff recognized their generally lower 'caste' status within the institution (indicated by lower salaries, fewer benefits, less autonomy, occasional disrespect from colleagues). [emotional, social, economic, political]
- Most Indonesian staff had fewer formal degrees, that is, their knowledge was less recognized. [social, economic, political]
- Indonesians (most from Java) were more comfortable/familiar with hierarchical social relations and thus less willing/able to confront those of perceived higher status. [social, emotional, cognitive]
- Causing a 'superior' discomfort or unhappiness was expected to have adverse effects on the Indonesian staff's employment, salary and/or promotion. [cognitive, economic, political]
- The average age of the Indonesians was lower than that of the international staff. Respectful behavior toward elders is valued and expected in Java. [cognitive, social]

Interestingly, there did not seem to be a significant gender differentiation in willingness to contribute. This case also highlights some institutional and normative constraints to ideal collaboration.

Note:

- a In this way, of course, I was enforcing my own view of 'how things should be' (i.e. equitable).

In the world of forestry, the 'lower status persons' above are quintessential forest dwellers, people characterized by intersecting marginalizing identities. These can derive from poverty, minority or disparaged ethnicity, the 'wrong' religion, atypical sexuality, illiteracy and/or low social class/caste, on the one hand; or the less malleable quality of female gender and the ever-changing quality of age. 'Higher status individuals' (also characterized by intersecting identities) can include company officials, bureaucrats, donors, business leaders, CIFOR researchers (the wealthy, those of the dominant ethnic or religious groups, sexually conventional individuals, the literate, and those of a higher class/caste).¹⁵ Such

differentiations will vary from place to place and time to time; and the significant ones in any one place will need to be ascertained – through listening, observation and study.

Box 7 portrays cognitive, emotional, social and economic factors at work in interaction among researchers at CIFOR. Like Box 6, this box demonstrates a self-reflexive intersectional analysis.

3.2 The emotional lens

The emotional lens focuses on how marginalization affects an individual's sense

¹⁵ In all these cases, within any category there is individual variation.

of self and their capabilities.¹⁶ Amartya Sen, a well-known economist, has focused much of his research on poverty and its effects. Sen redefined poverty as capability deficits (e.g. Sen 1999, 2005). Among the three main dimensions of capability deprivation (social, political and psychological), we are most interested in ‘psychological capability deprivation’ here. This refers to lack of self-confidence, deprivation of people’s sense of their own potential, rendering critical thought difficult.

Sijapati’s (2008; Sijapati Basnett 2011) example in Box 8 shows how different times and spaces can influence the psychological capability of individual women as they moved between their own community and into interaction with outsiders.

Kabeer (1999) uses ‘doxa’ (from Pierre Bourdieu) as the fundamental, taken-for granted, self-evident, common assumptions that inform an individual’s thoughts and actions. Such assumptions of social life can be exploitative and help sustain inequalities. The dimensions of power and inferiority are not immutable, and individuals can use their agency to challenge the arbitrariness of their foundations (Agarwal 1997) and push ‘doxa.’ Or, as Wieringa (2015) finds in her study of women who did not comply with heteronormative expectations in India and Indonesia (divorced women, prostitutes, lesbians), “[b]lame is internalized, while violence and suffering are accepted as ‘normal’ – perfect examples of what Bourdieu calls ‘symbolic violence’” (Wieringa 2015, 111).

Annex 1 discusses the difficulties of incorporating the marginalized, partially (though not wholly) because of their own emotional characteristics (as in Boxes 6 and 7), in Jambi, Sumatra. Ataguba et al. (2013) discuss their attempts to measure two of these psychological dimensions.

“For shame and humiliation, two indicators were used. Indicators for shame include the stigma of poverty and shame proneness which is defined as ‘the tendency to experience [the] emotion shame in response to specific negative events’ [...] Indicators of humiliation [...]

16 Klein (2016) turns this question on its head, looking at psychological dimensions that strengthen women’s (and men’s) empowerment and agency. In CIFOR’s ACM program we found that mobilization in collaborative effort tended to enhance these desirable psychological dimensions.

Box 8. Space and psychological capability variation among the ‘Tamang’

Sijapati’s (2008, 2011) study on community forestry gender dynamics in Nepal found that even women from Tamang communities – with fairly egalitarian norms and high interactive participation of women in forest-related decision-making structures – relied on men to act as intermediaries between themselves and forest officials. The women viewed their spaces as confined to the local scale; they did not think they had the experience needed to reach out to extra-local actors such as forest officials, nor did they feel confident to relate to the highly technical discursive space forest officials occupied.

are divided into two (external and internal). External humiliation relates to external events (e.g. discrimination, [dis?]respectful treatment and unfair treatment) and internal humiliation relating to internal feelings” (Ataguba et al. 2013, 339).

For post-structuralist gender theorist Judith Butler, subordinated individuals become attached to, and invested in their own subordination by seeking a sense of belonging through identifying with various categories constructed as subordinate (e.g. women, lower caste, working-class, etc.): “[T]he price of existence is subordination” (Butler 1997, 20). This is particularly exemplified by Nightingale’s (2011) case study (Box 9).

Klein (2016) examines the significance of two psychological concepts on the fringes of Bamako, in Mali, *Dusu* (internal motivation) and *ka da I yèrè la* (self-belief), showing how they functioned to empower women both for their own personal actions as well as strengthening community efforts.

Kabeer (1999) implies such emotions in her observation about respect. She recognizes the work of Dreze and Sen (1995) and Jejeebhoy (1997), who have noted “the deeply-entrenched rules, norms and practices which shape social relations in different parts of India and which help to influence behavior, define values and *shape choice*” (Kabeer 1999, 457; italics in original). Kabeer goes on to comment that:

Box 9. Untouchability and women's investment in the status quo

Nightingale (2011) examines the culturally constructed restrictions placed on Hindu women who are menstruating, in Nepal. Menstruating women are considered 'polluted', and prevented from crossing the threshold of homes. They must avoid contact with other people, crops or household items. By temporarily excluding women from social interactions, such practice has negatively affected women's confidence, social interactions, voice and influence in political and economic life. In 2005, women's movements lobbied the Nepali state to pass a law criminalizing the more extreme elements of the practice: *Chhaupadi* or banishing women to cattle sheds or 'menstruation huts' when they have their periods.^a More recently, the movement lobbied to enforce the law by adding that anyone who forces a woman to observe *chhaupadi* will face three months in jail and be fined USD 30.

Younger, educated women have also started to resist the practice. As education and 'awareness' (a social category in itself in the Nepali context) are linked to the idea that educated people move away from backward practices, identifying as 'aware' thus opened up space for contesting this practice. However, the practice of 'untouchability' lives on even among educated Hindu women who still opt to avoid physical contact with others when their bodies are seen as 'polluted.' Hence, Nightingale argues, these women do not fundamentally resist the culturally constructed, gendered idea of their bodies as 'polluted'. Drawing on Butler, Nightingale argues this can be seen as a sign of "the investment the subject [persons identifying as Hindu women] has in its own subjection" (Nightingale 2011, 157).

Note:

a See: <http://nytlive.nytimes.com/womenintheworld/2017/08/10/nepal-enforces-menstruation-hut-ban-with-new-law/>

"Since women are likely to be given greater respect within their communities for conforming to its norms, and to be penalized if they do not, their own values and behaviour are likely to reflect those of the wider community and to reproduce its injustices" (199, 457).

The most thorough treatment we have seen focusing on emotional elements in the forest context is that of Lachapelle et al. (2004). They studied perceptions of power and its exercise in three districts in Nepal's middle hills, producing the following results:

"This cross-group analysis of power led to the identification of three themes: inferiority, vulnerability, and lack of transparency. The narratives by forest users relating to inferiority were based on caste, gender, or literacy. The narratives relating to vulnerability were based on a lack of private resources. Narratives relating to lack of transparency were based on issues of information sharing and trust" (Lachapelle 2004, 4).

Interestingly, all three themes include important emotional elements. The authors noted as well the confluence of themes, such that lack of power in one realm tended to cross over into other realms as well. They provide telling and powerful quotations, for instance, from men and women of the despised blacksmith caste, reflecting their feelings of inferiority and powerlessness. The authors note that the theme of inferiority was particularly clearly related to caste, gender or literacy. They further note that skills and confidence that individuals consider lacking in themselves are locally seen as essential to effective participation in forest management and "help to explain why certain forest users either acquiesced or were unable to challenge existing institutional arrangements" (Lachapelle 2004, 7).

This study provides excellent information on emotional elements, and it recognizes and incorporates attention to the multiplicity of identities in the region. But from an intersectional perspective, we would also need to know the degree to which the combinations of identities exacerbate feelings of inferiority (or not). Does a young woman in the blacksmith caste feel greater inferiority than an elderly male blacksmith? Or does her experience

of inferiority simply *differ* from that of an old male blacksmith? What are the forest management and benefit sharing implications of such differences?

Feelings of inferiority and lack of self-confidence are not, of course, limited to those at the bottom of the social heap. It is quite possible for relatively elite persons to suffer similarly (see Box 6 or 7).

3.3 The social lens

Here, rather than focusing on the individual, we turn to the effects of the perceptions and actions of others on the marginalized. We are particularly concerned with stereotypes, narratives and related discrimination, and norms: key terms, three of which we first define. To these, of course, we add sexism. Stereotypes are exaggerated and over-generalized qualities built from valued features of identities within a given group. All human groups rely on perceptions of shared characteristics, values, goals that hold them together and differentiate them from other groups (Box 10).

3.3.1 Narratives

These are coherent but simplified ‘stories’ that are used to make sense of (while also distorting) reality, with associated meanings and connotations (Roe 1994; or see Glossary). A familiar example features men as breadwinners and women as homemakers, with their accompanying expectations and sociocultural implications. Elmhirst (2011) describes a powerful, gender-related version of this narrative in Indonesia’s forests. She traces the complex interactions

between governmental policies that stress male household heads as providers and women as wives, mothers and homemakers on the one hand, and the implications for land ownership, access to resources, migration and opportunities for wage labor, on the other. Narratives are also frequently used to justify policies. There are elaborate narratives about swidden cultivators, for instance – stories that present them as simple, backward, primitive, ecological marauders of the forest – and justify oppressive policies that outlaw swiddeners’ livelihood practices. Box 11 presents one such narrative with obvious discriminatory elements from Indonesia. There are also counter-narratives, common among NGOs, about ‘noble savages’.

3.3.2 Norms

Norms are collective representations and/or individual perceptions of acceptable group conduct. We are all influenced by the norms of our societies and those of our social groupings/identities. Our multiple identities can have conflicting norms. Among many societies, women are not expected to put themselves forward in public; yet a woman professional there may be expected to provide input publicly or a forest manager may expect women members of a community management group to contribute their knowledge. These norms can produce internal conflicts and difficult-to-fulfill societal expectations. See Box 12 for discussion of the impacts, based partly on differing norms, of a dominant society on a marginalized one.

In an Indonesian forest context, Dayaks and swidden agriculturalists are both commonly

Box 10. Role of stereotypes in evaluating job seekers in the United States

Using results from a large survey of job applications, job openings and the racial and ethnic background of job seekers in five major cities, Pedulla (2016) finds that: “when individuals evaluate others that occupy multiple social positions about which stereotypes are highly congruent – for example, being black and being unemployed – the additional category membership will have limited influence over the ultimate evaluation” (Pedulla 2016, 1).

He finds, surprisingly, that “unemployment is less penalizing for black workers than for equally qualified white workers during the job applicant screening process” (Pedulla 2016, 41). His interpretation of this finding is that: “[E]mployers’ racial stereotypes are so intense and so saturated with conceptions of African Americans lacking competence and having poor work ethics, that spells of unemployment – which prime similar stereotypes – provide the employer with limited additional information about the applicant” (Pedulla 2016, 41).

Box 11. A common and misleading narrative on shifting cultivation (Indonesia)

"Indonesia has a vast and underutilized forest resource, the primary function of which is to contribute to national development. Logging these abundant forests will provide needed foreign exchange, jobs for Indonesia's people, and wood for the nation and the world. These forests are virtually empty of people. Those few people who do inhabit the forests are ignorant and primitive, and they are an embarrassment to the nation. This [...] is shown by their animistic beliefs, communal ownership patterns, and most fundamentally by their practice of the destructive slash and burn agriculture. Civilizing these people – converting them to Islam or Christianity and persuading them to practice permanent, settled agriculture, like hardworking Javanese farmers – is essential both to improving forest people's lot and integrating them into the modern Indonesian state. Such changes will contribute to modernizing the entire country" (Colfer and Resosudarmo 2002, 388).

Box 12. The dominant interacting with the marginalized

Lin (2008) describes the situation of the Orang Asli, a previously hunter-gatherer society in Peninsular Malaysia, who were resettled due to the building of two dams. Although traditionally men's access to land was more straightforward than women's, access was not difficult for women either. With resettlement this has changed, as "women are generally absent from the schemes of the state except in relation to ideologies of family and women's place within them" (Lin 2008, 113). In the 1980s, the government made great efforts to convert the Orang Asli to Islam, and the communities are now so defined by the state. This conversion changed conjugal relations "with the introduction of the concept of 'woman as keeper of the family and home', whilst men are obliged to assume responsibility for protecting and providing for wife and children" (Lin 2008, 116).

In East Kalimantan, the Uma' Jalan Kenyah Dayaks were animist swidden cultivators until the 1960s when Indonesian Government soldiers came to their remote village of Long Ampung and gave them the choice between death and converting to Islam or Christianity. They opted for Christianity, given the importance of pigs in their cuisine, mythology and culture. By the 1980s, they had moved downriver to a more accessible place and been declared a 'resettlement village'. Although they still practiced swidden agriculture, they were firmly Christian (at least superficially), and one of their own men had been trained as a preacher. He preached (under the direction of an American missionary) that the women should be waiting with tea in hand at the door for their husbands when their husbands returned from the rice field (*whereas among this group women were the more active rice cultivators*). He berated the adults for not tithing 10% of their income to the church (*whereas this group had such a strong value on generosity, sharing and care of their own that it is very difficult for anyone to accumulate extra funds or assets*). When the people worried aloud to visiting government officials about the plans to bring oil palm companies into their region, the Javanese officials dismissed their concern, asking them rhetorically if they didn't prefer modernity to land. Most Dayaks are aware of disrespect from others, sensitive to the implication that Dayak men are dangerous, primitive and backward, and that Dayak women are promiscuous. The official's clear implication was that by opting out of oil palm they were opting to remain 'primitive'.

considered primitive and lazy. If Pedulla's interpretation is correct, being a Dayak swiddener may be less damaging to perceptions of a Dayak individual than being a Javanese swiddener (since Javanese have a reputation for being hard working). Similarly, a Dayak prostitute might be seen in a

less disadvantaged light than would a Central Javanese prostitute, because Dayak women are widely seen externally as promiscuous anyway. These are questions that have only begun to be addressed at all (see Wieringa 2015), but certainly not in forest contexts.

3.4 The economic lens¹⁷

This lens is the one most often addressed when considering gender issues in natural resource management contexts. Here we consider access to resources and employment, tenure and rules of inheritance more fully. A great many gender analyses address differential access to resources by men and women,¹⁸ but far fewer pay attention to the ways access differs with intersections of identities for either men or women. Here we specifically address access to resources, employment and inheritance patterns as they relate to intersectionality.

3.4.1 Access to resources

Djoudi and Brockhaus (2011) represent an excellent exception to the general absence of intersectional studies in forests in their study of men, women and two tribal groups of differing status near a lake that was drying up in Mali. This example shows the interconnections among the lenses clearly. Djoudi and Brockhaus wanted to understand differing local perceptions and experience with climate change and adaptation to it, among these groups. They built on their longstanding knowledge of the area, supplemented by separate workshops with adult men, adult women, and youth, as well as a variety of participatory rural appraisal techniques. They uncovered a number of ways in which different social categories were privileged or disadvantaged in the changing context. The drying out of the lake has meant that agriculture, traditionally mainly undertaken by the lower status Iklan group, is no longer possible in much of the region, reducing Iklan women's involvement in that activity. But the absence of men has meant that the women had to take on livestock care and charcoal making (from *Prosopis*) and sale. In a situation of reduced access to food (due to the reduction in area suitable

for agriculture), men were served food first, resulting in greater dietary problems for women. Lower status women had better access to charcoal marketing (one of the new options for women, because men were away working for money) than did higher status Illelan women: Such work was 'beneath them'. Illelan women's higher status had adverse effects on their mobility and autonomy, and increased their seclusion. Iklan women had additional problems related to tenure, because they did not have men's extra-community connections that helped men to deal with corrupt and non-transparent governance and marketing systems.¹⁹

Rocheleau et al. (1996) first pointed out that women's access to land in East Africa was often on the margins. Rocheleau and Edmunds (1997) provide a list of such margins:

"The bush growing along roadsides and fence lines, the small garden plots next to the house; the interstices above, below and between men's trees and crops; or the 'degraded' land found on steep, wooded hillsides or in overgrown erosion gullies" (Rocheleau and Edmunds 1997, 1355).

Nemarundwe (2005) builds on these ideas, pointing to differential access within groups as well in her research in Romwe, Zimbabwe. Her Table 7.1 incorporates both gender and age (2005, 156); she lists resource areas in her research sites, and indicates the users, whether men, women, boys, and/or girls. She describes the greater propensity of *young men* to encroach on community grazing and woodland product collection areas; and for *elderly men* to be the owners of cattle. Sithole (2005), writing about nearby Gokwe (also in Zimbabwe), documents the extra power to control resources that a publicly active older woman has, due partly to people's belief that she is a witch;²⁰ Nemarundwe (2005) writes about an unusually publicly active leader who is a widow. Both these women have close kinship ties to powerful men and both are also accused of promiscuity. Neither author brings these

17 As with the other lenses, the 'economic lens' is shorthand for several issues pertaining to livelihoods that differ across clustered identities in forested areas. The inherent unity of what is being observed via these lenses is perhaps clearest looking through the economic lens.

18 Colfer et al. (2016b) examine two collections of writings on gender and forests, finding that 86% of the papers in a collection of 'classics' in gender and forests addressed this issue, and in a collection of newer material (Colfer et al. 2016a), 100% addressed this issue. In a third collection on gender and agroforests (Colfer et al. 2015), 90% of the papers addressed this issue.

19 Similar practical disadvantages have been observed in South Asia and the Middle East for more elite women vis-à-vis marginalized women.

20 Sithole (2005) also notes the greater belief in witchcraft among the Shangwe, the marginalized group observed in the ACM research in Zimbabwe.

different identities together fully into an explicit analysis of how intersectionality functions in these areas, however.

Schroeder (1999) and Elias and Carney (2007) both document cases wherein the informal access women had in West Africa to resources (vegetable gardens and shea, respectively) was usurped by men, when the value of the resources increased (cf. Dolan 2001, for a Kenyan example). In Schroeder's Gambian analysis, the women banded together in collective action to bring their case to higher authorities, a strategy that can benefit multiply marginalized individuals.

3.4.2 Employment

Employment in the forestry and agroforestry sectors is transforming because of a wide range of factors. These range from increasingly complex and lengthening value chains of forestry and agroforestry products to broader agrarian transitions occurring in forested landscapes and the movement of people among rural, urban and transnational spaces. The rise in global demand for exotic or seasonal foods (e.g. fruits, nuts, coffee, cola), tree products for food and non-food industrial use (e.g. biofuels, argan oil, shea butter, palm oil) are creating jobs along with possibilities for many poor individuals and communities to escape poverty and economic deprivation. There is increasing concern that global firms are using a business model that exploits low-cost, low-skilled labor under insecure casual contracts without social benefits, often in physically poor or risky conditions.²¹

It is estimated, despite difficulties in coming up with precise figures, that 1.6 billion people worldwide (22% of the global population) derive part of their livelihoods from forest/tree-based systems (Vira et al. 2015). Relatively few countries collect sex-disaggregated data on employment in forestry. While women are estimated to account for about a quarter of the global workforce in the formal forestry sector and more in the informal sector, little is known about the type of work

women (and men) perform in these areas. Much is in the informal economy and/or home-based work – outside the purview of formal statistics. Information on work that different categories of women and men do and their prospects for 'decent employment' is even sparser. The United Nations Economic and Social Council defines 'decent work' as employment that "respects the fundamental rights of the human person as well as the rights of workers in terms of conditions of work safety and remuneration. [and ...] respect for the physical and mental integrity of the worker in the exercise of his/her employment" (United Nations Committee on Economic, Social and Cultural Rights 2006).

Case studies, nevertheless, provide important insights into key trends and trajectories. A wide range of studies of landscapes that have been converted from primary and secondary forests, agroforests and other forms of land uses to palm oil in Indonesia have found that women are employed as workers in these plantations, more so than their male counterparts. Regular work such as spraying and fertilizing are reserved for women. However, the majority are employed as casual workers with wages below the 'livable allowance'. They are exposed to hazardous working conditions, with no/limited entitlements to sick leave, insurance and other benefits that come along with a permanent position. Li (2015) in her study of palm oil expansion in West Kalimantan discusses the role of ethnicity in differentiating opportunities among women. Javanese women who accompanied their husbands when the plantations were first being set up benefited. In comparison, indigenous Dayak women were dispossessed of their lands and converted from independent farmers to low-wage workers without benefits, security or safe working conditions.

Box 13 describes another kind of vulnerability: that of a young forestry researcher in Indonesia to sexual harassment from a senior colleague, with financial implications for her future.

Problems related to employment and intersectionality also affect the developed world. In Canada, Reed (2003) examines the intersections of male and female forest workers and wives of forest workers, finding patterned reluctance of employers to hire women, to provide comparable salaries to them, and to promote them. Eriksen (2013) studies gender, fire fighters and community

²¹ The outsourcing of such jobs to developing countries is affecting labor in developed countries, where blue-collar workers are increasingly suffering downward pressure on wages or job losses as their factories are closed, resulting in rising political discontent.

Box 13. Sexual harassment and power (Indonesia)

In ROFIC,^a a junior Indonesian woman research assistant, Larni, was being sexually harassed by a senior Indonesian man, Djoko, with close ties to the Ministry of Forestry, an institution with which ROFIC really had to co-exist amicably. ROFIC's presence in the country was dependent on this ministry's good will. Djoko would habitually make lewd remarks, pat women inappropriately and tease them sexually. On one occasion he publicly sang a love song to a senior white woman scientist and member of ROFIC's Board of Trustees. On another, Larni visited his office to deliver some papers. He closed the door behind her, locked her in, kissed her and proceeded to cajole her to engage in more physical sexual activity. In the end, she managed to escape without further harm. She told her story to the senior white woman researcher who had agreed to help such victims. The senior woman encouraged her to make a formal complaint; such behavior was clearly against ROFIC policies. Larni, however, expressed her fears: general embarrassment that others should know about it, discomfort confronting her attacker face to face, but also fear about the implications for her future. Djoko was a powerful man, with a wide-ranging network of influence. He could make life very difficult for her if he knew of her complaint.

In this case, Larni had support from the institution. Since Djoko had made overtures to other women as well, he did not know who had made the [informal] complaint. ROFIC's leader discussed Djoko's behavior with him. Not long afterwards Djoko transferred out of the institution. But in many contexts, junior women in forestry bureaucracies must simply 'grin and bear it' or lose their positions; one also wonders if the senior board member in this case may have graciously accepted Djoko's attentions in similar fashion, hoping not to rock the boat for ROFIC. This man's sense of entitlement from his gender, age, experience and position – combined with a different ethical system – made him feel at liberty to treat women with various identities in this fashion.

Note:

a Pseudonyms are used in this example.

members in Australia and the United States. Her ethnographic approach seamlessly integrates attention to intersectionality, as she documents gendered patterns of discrimination with economic effects. Li (2015) looks at oil palm workers of two genders, various ethnicities and employment statuses in Indonesia, showing the ways that these intersect and affect individuals' opportunities.

3.4.3 Inheritance

Rules of inheritance, which can be *the* most important way of gaining access to land and capital, vary enormously by location. Some of the options include matriliney (in which goods are inherited through the mother's line), patriliney (through the father's line), bilateral inheritance (through both father's and mother's line), primogeniture (through the eldest child, usually the eldest son), ultimogeniture (through the youngest child) and more. National governments and their formal inheritance rules are most likely to specify/assume either patrilineal or

bilateral inheritance. Increasingly, there is statutory recognition of women's equal rights to inherit. But a policy intended to rectify one form of discrimination (e.g. the ability of the more powerful to acquire the lands of the less powerful) sometimes exacerbates or at least reinforces another form of discrimination (e.g. inequitable customary gender norms).

In India and Nepal, for instance, until recently, women were barred from inheriting land until they were 35 years old and married. Such discriminatory policies have been successfully challenged and changed in recent years. For instance, the Hindu Succession Act of India, and the 2007 Interim Constitution of Nepal have meant that women are equally entitled to inherit parental land. While there is no denying that these changes provide the normative framework for women to make claims should they wish, research monitoring progress on reducing the gender gap in ownership of land has shown that these policies have had very little effect (Rao 2017). These countries remain among the most skewed globally.

Conflicts between traditional and statutory rules are also common, with varying impacts. In many patrilineal societies, women's statutory rights are ignored; and matrilineal systems, which governments may consider 'primitive,' can be warped such that husbands take over the traditional rights of brothers and women's traditional rights may disappear. As gender and wealth interact, different results can also obtain. When wealth is great, there may be stronger pressures to keep the wealth within the patrilineage, rendering women more disadvantaged. Or conversely, the woman's access to that wealth may strengthen her voice in obtaining her full share. An older woman may have the support of adult sons to retain access to lands that a younger woman would have to relinquish. In many areas, a divorced or widowed woman may have greater difficulty retaining lands that by custom should be hers (e.g. Li 2014, in Sulawesi; also seen among Kenyah Dayaks in East Kalimantan by Colfer). We do not yet know very much about how inheritance patterns affect the intersections of identities. But they definitely affect people's ownership of and access to forest lands and differentiate people socially and economically vis-à-vis a wide range of risks related to land.

3.5 The political lens

This refers to the distribution of power and resources within a given society. These distributions are mediated by formal and informal institutions and organizations at multiple levels, from household, community, state and market levels. To put it differently, institutions, or 'formal and informal rules of the game', govern distribution and exchange of resources. We have touched on both power and resources in multiple ways in the other lenses. Here we focus on the application of an intersectional approach to understand how institutions operate, and the ways in which they enable and constrain differently situated forest actors. Understanding these processes is critical as they contribute to Sen's 'political capability deprivation' of marginalized individuals and groups at the intersection between different identities by limiting their access to political decision making, opportunities to voice aspirations and opportunities to take collective action (beyond capability to vote alone). Here we focus on both local-level institutions as well as broader levels.

As Agrawal and Gibson (1999) argue in an authoritative paper, multiple actors with multiple interests (overlapping and/or conflicting) interact with each other through the processes of formulating and implementing rules that govern natural resources along with resolving conflicts that arise in the interpretation of these rules. Actors bargain and negotiate among themselves to ensure that their interests are incorporated in these institutional arrangements. But these processes of institutional formation and relative bargaining/negotiation power of individual actors are a reflection of, and defined by, the existing distribution of power and structure of incentives (Agrawal and Gibson 1999). As Kabeer (1999) further explains, institutions at various levels give certain actors authority over others in determining the principles of distribution and exchange so that allocation of resources tends to be embedded within distribution of authoritative resources – the ability to define priorities and enforce claims.

Gender scholars have explicitly and implicitly engaged with a 'politically aware approach to understanding institutions' in explaining the exclusion of women from the seemingly democratic institutions established to govern resources. Many argue that 'formal rules' dictating that only one member of the household can be represented in community forestry groups, serve to exclude women altogether (Agrawal 2001, 2010). Even when formal rules are less stringent or even gender progressive, the costs and benefits of participating in collective action are shaped by existing gender relations. Although it may be in women's interests to participate in community forestry because of the gender division of household provisioning work, the opportunity costs involved in attending meetings, participating in maintenance and enforcement of regulations, etc., are often higher for many women than for some men. Further, gendered ideologies, about appropriate roles and spaces for women and men, are often carried over in public spaces where decisions about community forests are made, thereby reducing women's incentives to participate (Zwarteveen and Neupane 1996; Meinzen-Dick and Zwarteveen 1998, 2001).

Researchers also point out that there are symbolic or ideological dimensions of institutional processes (also of relevance to the cognitive and emotional lenses discussed above). Studies from South Asia show that natural resource decision-making processes are often considered public

affairs that not only impinge on an individual's concerns, but on the entire locality (village and/or community). The decision to participate in collective action is more than maximizing benefits from resources. Men in particular may derive prestige from participating in public affairs and assuming decision-making roles (Sarin 1995, 2001; Meinzen-Dick and Zwartveen 1998; Agarwal 2001).

Much of the literature on gender and forestry has been focused on the question of why women as a group do not participate in forest governance, and/or understanding the conditions under which they do participate. Most are focused on South Asia, although literature from other regions (e.g. Latin America and East Africa) are emerging. Within this literature, researchers have attempted to unpack 'women' and consider differences among them. It has been variously shown that 'women's interests' and thus their identity and representation are embedded in their environment, families and communities, as well as social, economic and political institutions, which can lead to complex and sometimes contradictory positions. For example, Banana et al. (2012) find in Uganda that educated women are often not particularly good at representing all women's needs. Another study in the mid-western region of Nepal notes that women representing land-rich and high-caste households mostly capture decision-making

positions and influence decisions according to their own interests (Bee and Sijapati Basnett 2016).

Still others have focused on the flip side of the coin: why it is that powerful men are interested in monopolizing governance of forests in the first place. Byrne et al. (2016) take a more intersectional approach to addressing this question and find that contestation over governance of forests in Nepal is closely linked to broader processes of political change, including the civil war, the post-war transition, ongoing federalization processes and ensuing struggles over territory and citizenship. A wide range of powerful political actors located at the interfaces between gender, ethnicity, caste and/or political affiliation, remain invested in governing community forestry user groups (CFUG) precisely because they rule over significant local resources (financial and basic subsistence). Even those less dependent on these resources still have vested interests in forest governance for the purposes of "political profiling, building up leadership experience, or deciding how the CFUG fund will be spent" (Byrne et al. 2016, 1272).

Together, these studies show that instead of drawing on stereotypes about women and men, the emphasis must be on unpacking "people in nested and overlapping constituencies that reflect the multiple roles, identities and interests of men and women across class, location, occupation and other points of difference and affinity" (Bee and Sijapati 2016, 7).

4 Applying intersectionality in forests and agroforestry landscapes

Much of the available literature on intersectionality is concerned with defining it, recognizing its importance. But very little specifies how to study it and use our findings more effectively. We still need to study and understand the familiar division of labor, access to resources, time use and other conventional elements of gender studies – as these interact. Attention to interactions among these in an intersectional manner can help us nuance our analyses, whether for research, forest management, community action, policy development or other related needs. We hope to realize Kaijser and Kronsell's (2014) expectation that attending to intersectionality can help communities and their constituent parts, including the marginalized, make their wishes known and create analyses that foment “agency across and beyond social categories” (Kaijser and Kronsell 2014, 417).

Much of the literature on intersectionality has come out of women's and gender studies (e.g. Nash 2008; McCall 2014). We build on this literature to strengthen the concept's use in natural resource management where it has been virtually absent (MacGregor 2010). A central concern of course is equity and strengthening the voices of those who have not had access to decision-making processes, whether at national, community or household levels. Another is enhancing our ability to strengthen agency, the ‘power to’, in forest communities and beyond.

Rare among intersectionality students, Yuval-Davis (2006) suggests a series of ‘components’ or steps, for practical implementation:

- “Data collection, which depends on the availability of desegregated data of various social, legal and identity categories of women;
- Contextual analysis, which would probe ‘beneath the single identity to discover other identities that may be present and contribute to the situation of disadvantage;’

- Intersectional review of policy initiatives and systems of implementation in terms of their efficacy in addressing the problems faced by different intersectional identities;
- Implementation of intersectional policy initiatives based on the above” (Yuval-Davis 2006, 204–5).

Yuval-Davis addresses some of the difficulties of implementing these steps, large among them being the tendency for data to have been collected based on separate identities, with little regard for their intersecting effects. She further emphasizes the need to

“analyse the differential ways in which different social divisions are concretely enmeshed and constructed by each other and how they relate to political and subjective constructions of identities” (Yuval-Davis 2006, 205).

We build on the work of Yuval-Davis as well as the five lenses on intersectionality, as we focus on the situation within and near forests. The steps we recommend include:

- a. understanding how a local system works, with a focus on gender and the cross-cutting identities that influence a person's life chances
- b. identifying who marginalized stakeholders really are, what clusters of identities are most relevant in the forest and in people's lives, and how such marginalization is sustained
- c. estimating the level/significance/nature of discrimination for complexes of identities in the forest community – to strengthen the likelihood of acting equitably
- d. clarifying institutions, norms and narratives that sustain marginalization, ranging from local to global, current to historical
- e. strengthening collaboration within and among subsets of the community, to ensure, over time, that proposed management changes do

- not adversely affect multiply disadvantaged individuals/groups
- f. changing policy based on intersectional analysis; we have found that timely and targeted insertion of advice can influence the ‘rules of the game’.

These are not meant to be linear; they are not a ‘check-list’, but rather insights that may be useful in applying intersectional analysis in our research contexts. We discuss each step in turn.

4.1 Understanding how a local system works

Attempts to address intersectionality begin with understanding holistically how the local social and economic systems function, including attention to gender and key cross-cutting identities. We can begin in various ways, including mapping out the study locations, major social groups and their relationships, land-use patterns, livelihood portfolios, proximity to infrastructure and services, etc. There are many ways to drill down, once this is done; Borrás (2009), for instance, suggests finding out who owns what, who does what, who gets what (outcomes of livelihood portfolios), and what folks do with any surplus. Understanding local systems also necessitates asking the ‘why’ questions and thereby examining the historical, social and political context in which these systems exist. Feminist concerns about gender division of labor, access to resources, decision making, authority and influence all come to bear in examining these questions.

There are several ways to gain this knowledge:

- a. hire or collaborate with one or more social scientists²² who approach community studies holistically (i.e. *not* focusing on income or livelihoods alone)

²² The choice of a social scientist is important. Cultural anthropology, development sociology and cultural geography are likely disciplines; political science, human ecology, agrarian change and gender studies are also of interest.

- b. organize time (no less than 2 weeks; ideally a year or more) in each community, observing,²³ and interacting with local people
- c. read ethnographies and other accounts of pertinent systems.

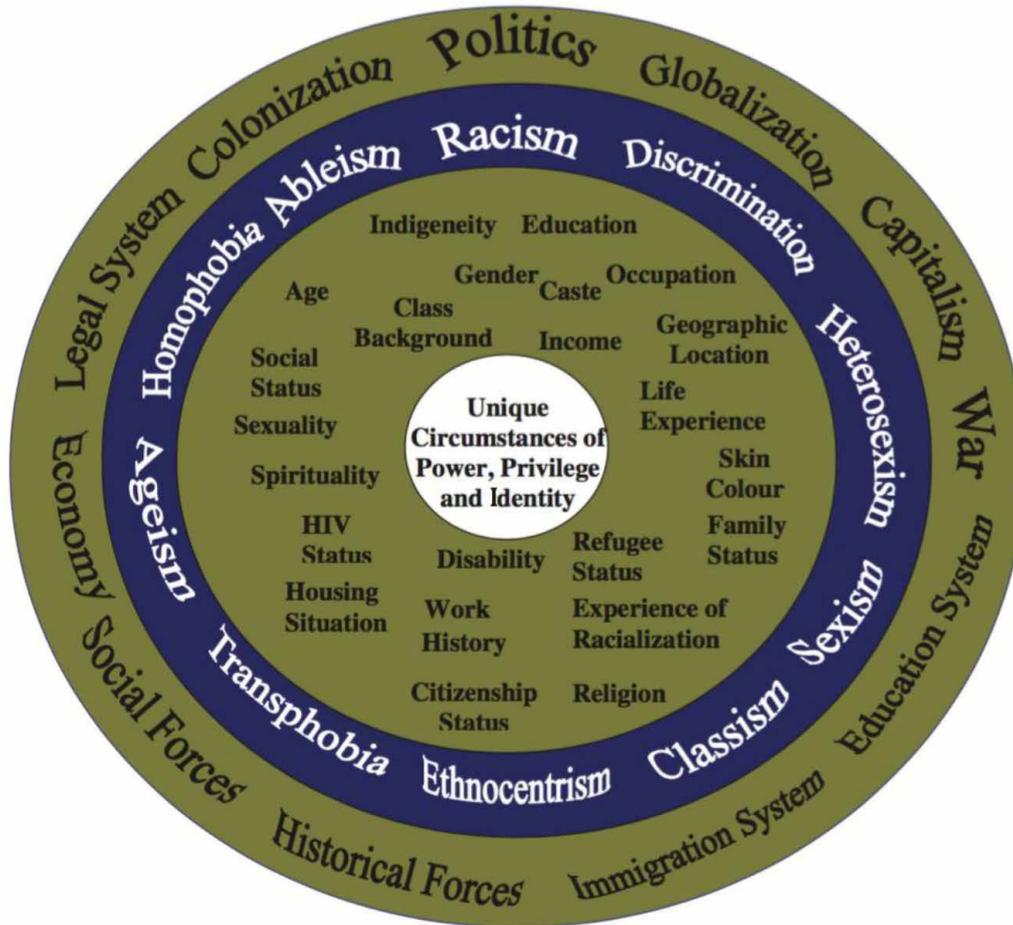
A combination of these approaches is ideal. Box 14 summarizes one view of the contextual factors and processes.

See www.cifor.org/acm/beyond/methods-tools.htm for other tools of use in understanding people in forest contexts.

Irrespective of our entry point, the focus must be on how one aspect of identity (e.g. ethnicity or religion) takes different shapes for women and men, landed or landless, old and young, high and low caste, etc. Furthermore, the relations between groups in specific contexts and time periods and the power relations that underlie why one person is marginalized while another is not, will need to be examined iteratively. More in-depth research or time in the field can help fine-tune the intersectional analysis, and validate and/or expand the provisional social categories we use at the beginning of our research. Here, questions about how the marginalized identify themselves, how others see them, and whether there are any identity-based movements or grievances, might be relevant for further inquiry.

²³ Such observation requires consideration of issues of objectivity. There has been a widespread and vibrant critique within feminism of the possibility of being truly objective about social phenomena in general and about gender issues specifically – as we are all intimately enmeshed in the gender systems in which we grew up. We accept that true objectivity is a chimera. However, in observing, one can (a) try as much as possible to set aside one’s assumptions; and/or (b) attempt to convey the assumptions and biases of which one is aware; and/or (c) convey key elements of one’s background, allowing the reader to assess these. None of these ‘solutions’ is perfect. Lykke (2010) summarizes Haraway’s similar view that: “the researcher, through a conscious reflection of her or his situatedness and her or his research technologies, can obtain a partially objective knowledge, that is, a knowledge of the specific part of reality that she or he can ‘see’ from the position in which she or he is materially discursively located in time, space, body and historical power relations” (Lykke 2010, 5).

Box 14. A visualization of factors involved in a contextual view



This diagram, developed by the Canadian Research Institute for the Advancement of Women (CRIA)W) situates the unique individual experiences of privilege and oppression within a broader, multilevel framework. It demonstrates how the various aspects of a person’s identity are situated within a context of discriminatory norms and attitudes, shaping experiences of social inclusion and exclusion. These norms and attitudes are further shaped by broader political, social, economic, historical and environmental forces and processes, which work together to produce and reinforce – or counteract – processes of inclusion and exclusion (Simpson 2009). This combination of elements is the unity we seek to understand and address via the four lenses.

Li’s (2015) paper, “Social Impacts of Oil Palm in Indonesia”, illustrates well how this framework can be applied in a forestry context. Focusing particularly on West Kalimantan, Li argues that the empowering or disempowering impacts of oil palm expansion were diverse and often differentiated between “women and men, old and young, ‘locals’ and migrants, and those with and without access to land and capital” (2015, 31). The unequal outcomes can be partially traced to sexist and racist sentiments in the smallholder schemes and plantation labor practices, some of which include: refusing to acknowledge women as land owners; imposing a gendered and ethnic division of labor; and relegating women to casual, low-paying jobs. These practices are further made possible, legitimized and reinforced by a broader national and global context, including aspects such as weak protection of customary land rights, weak protection of labor rights, Indonesia’s colonial legacy, global demand for palm oil (and the role of oil palm in Indonesia’s national development strategies), corruption and so on. For a more thorough and detailed account, access the publication at: <https://tspace.library.utoronto.ca/bitstream/1807/70868/1/social%20impacts%20of%20oil%20palm.pdf>

Source: Simpson (2009, 5).

4.2 Identifying who the marginalized really are and how their marginalization is sustained

You will have been making progress on this endeavor while studying the local system. This is a process that gradually homes in on the issue of interest - the combination of those individuals multiply marginalized and the institutions and interactions that sustain such marginalization. An important first step is to examine your own multiple identities and how these relate to the people with whom you are working. This process, described in Box 15, can then be used to consider the intersectional situations of various groups within your population of interest as they interact.

It will not be practical to look at all possible combinations of identities, nor is it needed (as noted by Kaijser and Kronsell 2014). It does, however, require a flexible approach to research (e.g. adding or removing categories, and/or changing or further disaggregating the analyzed groups if or when needed). Consideration of power relations and politics of identity formation will be central. In other words, being attentive to the questions of how people identify themselves; how they identify others around them; and how this is related to distribution of power and authority.

4.3 Estimating differential power for intersecting characteristics

Power and power differences, in the sense discussed here, have typically been assessed in qualitative terms, through in-depth ethnographic work, without any attempt to quantify their local importance. We offer these eight indicators of differences in power and inequality to guide researchers who may have minimal or non-existent experience to *begin* assessing overt power differentials (relevant lenses in brackets):

1. Avoidance: Reluctance by the marginalized to attend public meetings²⁴ [cognitive, emotional]
2. Attempts to exclude the marginalized from public meetings by the more powerful [social, political]

3. Evidence of fear, shame and/or humiliation, reluctance to speak up, among the marginalized in interaction with the dominant [emotional, cognitive]
4. Social norms about interaction, specifying respect 'up' and disdain and/or paternalism 'down' [social]
5. Explicit orders from the dominant to the marginalized, with obedience to such orders [social, economic, political]
6. Anticipation of and acting upon the likely wishes of the dominant by the marginalized, without necessarily being told [all lenses]
7. Obvious inequity in access to newly available opportunities (such as training or distribution of benefits) [economic, political]
8. Extreme wealth differentials [economic]
9. Extra-local links with powerful actors, networks and resources [social, economic, political]

Feminist scholars have also attempted to quantify power differences at the national (e.g. UNDP's gender in development index, gender and empowerment index, SDG indicators) and household levels. For instance, the Women's Empowerment in Agriculture Index (WEAI) is an aggregate index that serves to measure gender parity at the household level and women's overall empowerment in their households and communities. For the latter, it considers five domains of empowerment, which include:

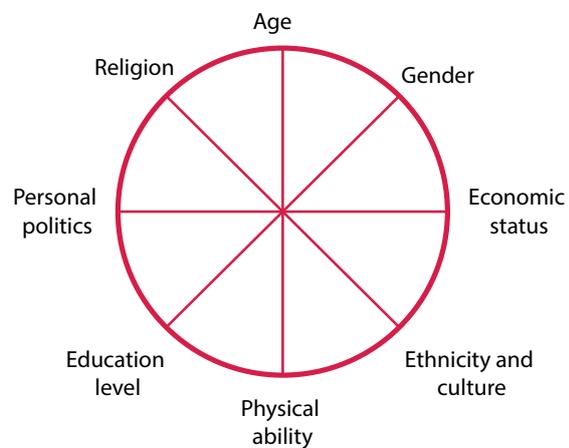
- production (input in productive decisions and autonomy in production)
- resources (ownership, access and decision-making power over resources such as land, labor and capital)
- income (control over use of income)
- leadership (group membership and comfort in public speaking)
- time (workload and leisure).

Combining these approaches (or others) allows us to assess how social relations intersect to position individuals and groups in different and contradictory ways in specific times and contexts. For instance, a woman who comes from a family with extreme wealth concentration in a patrilineal community in rural India may be economically well-off, while simultaneously being marginalized because she cannot inherit land and does not have a say in decisions about what to produce, how much, where to sell, etc. When a woman stakes a claim on parental land, her claim may be

²⁴ In India, elites avoid contact with 'lower' castes due to fears of pollution, but this is less common than avoidance of elites by the marginalized.

Box 15. A wheel diagram and analysis of significant intersecting differences

This diagram depicts eight aspects of a person's identity, each of which may have enabling or disabling effects in a given situation and context. To illustrate, the authors use the example of a researcher working in a rural community. In order to help researchers reflect on their own power and privileges, the researcher is asked to mark how enabling or disabling they believe each of these identities is to them in a particular research setting. Placing a mark closer to the center means that a particular aspect has a disabling effect, and vice versa. For instance, a young, white female researcher working in rural Brazil might experience that her age and gender puts her at a disadvantage when discussing with older and powerful male leaders. On the other hand, these same traits may make her more approachable to youth and women in the community. Her whiteness may also well trump the disabling effects of her age and gender, giving her access to the local elite, while at the same time possibly arousing suspicions about her intentions or prompting respondents to provide answers they think she wants to hear. Having recognized and reflected on her position in the community, the researcher may now think of ways in which she can adjust her behavior to minimize or partially control for the disabling impacts of various aspects of her identity. The difficulty of doing so is clear, however, from the examples in Boxes 6 and 7.



The exercise neatly illustrates many of the points we hope to stress in this manual, namely (a) each individual is shaped by multiple identities; (b) these identities may have both enabling and disabling effects in a given situation and context; (c) these identities may be perceived differently by different groups of people; and (d) the privilege and oppression associated with the various identities depends on the local context (and change over time), which includes institutions, norms, narratives, etc. These may be unique to that context or may transcend it, in some cases with global reach.

Source: Jost et al. (2014, 57)

considered illegitimate, she may risk being branded a witch and ostracized from everyday village life (Rao 2013). At the same time, life-cycle processes may marginalize some women more than others. Women who have been married for 10–15 years and have borne a male child may be allowed to join forest user groups and have a say in what kinds of rules govern entry and use of forest products. In comparison, younger women in the same household may face greater restrictions in attending public events, and may be more burdened by household and other chores. In Indonesia, some women have the right to own land, may have more say than their male counterparts in decisions related to land, and control the fruits of production in their land. But then they may stand to lose access to land altogether because their rights to land are not recognized officially, and they are not consulted when decisions to convert their land to cash crops are made by government representatives, male community leaders and companies.

As Rao (2017) points out, there are three problems with indicators such as WEAI. First, they risk assuming that women and men in the same household are seeking individual gains or material wealth in competition with one another, and hence, these household models pit women against men. The relational aspect of women's lives, the fact that cooperation and reciprocity can be central to people's well-being, particularly in the face of the larger social, economic and political changes that households are facing every day, is ignored. Second, by portraying women as agents lacking in assets (productive resources, income), they deny women any agency or narrowly interpret agency in terms of 'ability to make decisions'. As Kabeer (2001) argues, operationalizing agency in terms of decision making is limited because agency can take a number of other forms such as bargaining and negotiation, deception and manipulation, resistance and cognitive processes of reflection and analysis. Even seriously marginalized people are not in fact powerless, as Scott (1985) made famous in his book, *The Weapons of the Weak*. He showed the many weapons 'the powerless' have to counter the exercise of power by 'the powerful' (e.g. avoidance, postponement, deviousness, artifice and ultimately, violence and/or collective action). We see many of these mechanisms at work in gender studies as well (see Agarwal, Li and Schroeder in Colfer et al. 2017). Understanding how intersectionality plays out in a given place will require attention to both the obvious and the subtler mechanisms in place.

Returning to Rao (2017) and WEAI, by focusing on abstract households, other long-standing oppressive structures, tensions and exclusions in the institutions of the state and society are ignored.

Both sets of indicators oversimplify and render more static the reality of power and its use in real communities. They show us who has power over whom, but they do not help in identifying the norms, narratives, institutions, and policies that produce and legitimize the power imbalances. It is important to remember that a person who may be relatively powerless in one context (e.g. an Indian woman in a public meeting or with her husband or father-in-law) may be quite powerful in another (e.g. in interaction with her daughters-in-law). Like the assessment of stakeholders and clusters of identities in the previous section, the process of assessing power differentials will require a second step, one that examines the interactions among people and the contextual features and institutions that sustain differential power. Understanding how intersectionality plays out in a given place will require consideration of both the obvious and the subtler mechanisms in place.

Ideally an explicit and systematic study should be done, based on observations of individuals with the selected identities, in multiple contexts, using ethnographic methods. This approach requires that each interaction be a unit of analysis. The intersecting identities of those interacting would be assessed, the ways that power is manifest between them, and the degree and nature of the power differential to capture both the features and dynamism of intersectionality.

The fact that the *most disempowered are unlikely to be available to assess, without an explicit effort to seek them out* is a key point to remember. This is particularly important with regard to women in many contexts. These assessments will require more interaction with local community members than is typical in forest-related research.

4.4 Clarifying institutions, norms and narratives that sustain marginalization

The pertinent institutions, norms and narratives that sustain marginalization differ as much from place to place as do the clusters of identities discussed above. Some are, however, global or national in scope and with long-standing relevance.

These include such phenomena as racism, (post) colonialism, capitalism, nationalism, ethnic identity, religion and sexism (see Box 10 for more). Their relevance in any given place varies, but can be central, with effects that permeate local action and interaction. This is as true of forest contexts as of others.

Besides these broad patterns, each community has its own institutions, norms and narratives that maintain the existing structures of power, whether in the home, the work place or in public arenas. These can be based on ethnicity, lineage (or other kin group), religion, political party, occupation and more. Local ideas about age and sex almost always include narratives and institutions that variably favor particular categories of individuals and disadvantage others. For instance, in an ongoing study on land-use change in Nepal, Sijapati Basnett et al. (in press) are finding that the village elites have established an 'improvement committee' that decides on all aspects of village life from the price of chicken to that of land and daily wage work. The official reason is to 'manage inflation and the cost of living' in the village. But researchers are finding that this also prevents the less powerful actors, who are increasingly diversifying their income by migrating overseas, from purchasing land, demanding increases in wages and thereby disrupting the caste-based hierarchies in the village.

Social divisions, and the institutions in which they are expressed, are located at multiple levels, and they interact and overlap in various ways to structure the lives of social groups. For instance, to understand why low caste women are excluded from participating in forest user group meetings, one might find that degrees of participation and 'voice' are determined by factors at multiple levels, including: norms restricting women's mobility and 'outspokenness'; household division of labor; land/resource ownership; male biases in land titling; customary systems based on kinship; ideas about age-based seniority and so on. A review of relevant formal and informal institutions should thus reveal different ways in which various social divisions are either explicitly or implicitly expressed, enacted or reproduced within legislation, customary systems, and families. Importantly, the significance of these institutions in shaping the participation of groups and individuals is not predetermined. Hence, Hankivsky urges us to address simultaneously "processes of inequity and differentiation across

levels of structure, identity and representation" (Hankivsky 2014, 9).

It is, however, also important to point out that the forest user groups themselves are not neutral institutions, but entities that – depending on one's standpoint (cognitive lens) – may express various elements of social divisions and power. For instance, Arora-Jonsson (2010) shows how men in an Indian village tended to perceive forest user groups as neutral, inclusive and genderless, whereas women saw the same groups as male dominated and marginalizing. While the men invited women to participate, they were "less inclined to address the gender and power relations that gave rise to the [gender] differences in the first place" (Arora-Jonsson 2010, 42). As a result, many women opted out of participating in the meetings and chose to organize in separate women's groups instead—thus laying bare the implicit gender bias of the formal user group (Arora-Jonsson 2010).²⁵ This example also illustrates how institutions can simultaneously be used by the powerful to sustain or reproduce inequalities, while also functioning as sites for the marginalized to assert agency and express resistance.

Like the intersections of identities, these institutions can be mutually reinforcing or they can represent counter forces within society. Efforts at social change can build on those forces – like the ideology of democracy or ideals of gender equity – that can be mobilized to weaken inequitable institutions. But to make beneficial use of such positive forces requires understanding how they are functioning; and that typically requires an ethnographic and/or participatory approach to gaining such understanding.

There are a variety of strategies for trying to make such changes, including advocacy, catalyzing collective action, changing individuals' and/or groups' attitudes and behavior, and policy change. Probably all are needed, as the task is monumental.

4.5 Strengthening collaboration within and among subgroups

This topic includes both efforts to work collaboratively at the community or landscape

²⁵ Similar patterns were also observed by Arora-Jonsson (2010) in Sweden.

level and broader efforts like political movements and partnerships. Intersectionality is inherently a normative project “explicitly oriented towards transformation, building coalitions between different groups, and working towards social justice” (Hankivsky 2014, 3). While intersectionality has at times been used to legitimize narrow identity-political struggles (Hankivsky 2014), one of its greatest strengths lies in its ability to facilitate collaboration and collective action across identity-based groups. Toward this end, Cole (2009) encourages the intersectional researcher to seek out similarities – not only differences – in the experiences of different groups.

For instance, ‘women’ and ‘indigenous people’ are two groups often overlooked in climate policy. Instead of each fighting their own battles, women’s movements and indigenous peoples’ movements are increasingly coming together to demand equality and justice in climate policy (Hemmati and Röhr 2009). Joining forces is, however, not only a more viable political strategy. As the popular slogan “No women’s rights without indigenous peoples’ rights” asserts, this movement demonstrates the critical intersectional insight that addressing women’s rights requires addressing *all* women’s rights, including indigenous women’s. At the same time, addressing indigenous peoples’ rights requires attention to gender issues within the indigenous communities.

Forestry/agroforestry research often focuses narrowly on sector-specific organizations, and government and non-governmental agencies. Broadening the horizon and being open to new partnerships and collaborations may open up spaces for greater collective action and change. As Arora-Jonsson (2011) points out from the example earlier, instead of asking why women do not participate in formal forestry user groups, it might be more important to ask where women do participate and still influence resource access, use and management. Similarly, as scholars on agrarian change observe, building coalitions may require being attuned to the many ways in which contestations and negotiations are already occurring in multiple domains, and supporting these efforts through rigorous research. Kerkvliet (2009) classifies these into three types of contestations over authority and allocation of resources: official, everyday and advocacy. Official politics includes authorities and organizations in

governmental and non-governmental agencies making, implementing, changing, contesting and evading policies over resource allocation. ‘Everyday politics’ follows Scott (1985) and refers to:

“people embracing, complying with, adjusting, contesting norms and rules regarding authority over, production of, or allocation of resources in subtle expressions and acts that are rarely organized or direct” (Kerkvliet 2009, 232).

These low-profile actions can lead to high-profile outcomes. And advocacy politics refers to “direct and concerted effort to support, criticize, oppose authorities, their policies and programs, or the entire way in which resources are produced within an organization or a system of organization” (Kerkvliet 2009, 232).

The current generation of advocacy politics has been sparked by excesses of neoliberal globalization such as rising inequality, greater social differentiation, growing risk of changing climate, ‘land grabs’ in the name of food, fiber and climate change (Sikor 2010). But the greater accessibility of information and communication technology and movement of people between and within urban–rural transnational spaces that have accompanied globalization are also transforming social movements in more distinct ways than in the past. More horizontal solidarity linkages and polycentric rural social movements are linked together transnationally via networks, coalitions, etc. (Borras 2009). Hence, seeking to effect change through research and action may necessitate understanding how forested landscapes are changing as well as looking within the very local level.

The most straightforward and multi-purpose way to approach intersectionality in the forest – with a concern for social justice – will be through collaborative approaches in forest communities. Such approaches allow for regular interaction between formal forest managers and the multiply marginalized. The multiply marginalized in forests are typically also involved in forms of traditional forest management that may be suitable for incorporating more meaningfully into government or industry management plans – women with various marginalizing and intersecting identities are certain to be included. Such interaction will equally serve the purpose of helping managers to understand how intersectionality plays out in

the particular forest in question, and ensure that proposed management changes do not adversely affect multiply disadvantaged individuals/groups.

Another way in which collaboration may be useful involves showing how intersecting power relations may marginalize different groups in similar ways, allowing broad coalitions to take shape. If our focus were simply on identifying the most marginalized and/or the most privileged, we would run the risk of obscuring similarities between groups, reproducing stereotypes, reinforcing identity politics, essentializing differences, undermining broad-based collective action and inviting categorical policy responses aimed at 'lifting the most marginalized', rather than addressing the power imbalances that are so central to our social justice concerns.

Given the facts that women are at least half of most populations, that they are almost always more marginalized than men with equivalent clusters of identities, and that they have typically been underrepresented in forest research, we suggest *beginning* any study of intersectionality with an initial emphasis on women. This will ensure that they *are* included, and thereby contribute to rectifying the traditional gender imbalance in forest-related research, as well as strengthening attention on the topic of intersectionality. The intersectional and interactional elements of the work proposed here will ensure that men, some of whom will be among the more powerful, are also involved.

Previous research has also shown that a long-term collaborative approach is the most likely to succeed in efforts to involve women in forest management. Women in many groups are disadvantaged in terms of knowledge of the national language, norms discouraging interaction with outsiders, lower educational levels and shortage of time due to excessive work demands. Overcoming these constraints takes time and effort that has rarely been attempted. When it has been attempted, though, there has been considerable success (see Colfer 2005a, b; or Mukasa et al. 2016; or www.cifor.org/acm/, for positive examples).

4.6 Policy change based on intersectional analysis

Although strengthening collaborative effort with communities is certainly the most direct path to local change (including local policy change),

we are also interested in influencing policy at broader levels. We have found that local-level research results can sometimes – if presented to decision makers in a timely manner – have direct influence in terms of changing the rules of the game to enhance equity. The recent work by Li (2015) and Elmhirst et al. (2017), for instance, applying an intersectional analysis to understand who is gaining and who is losing from large-scale oil palm expansion in Indonesia, is influencing the Roundtable on Sustainable Palm Oil to produce its own gender strategy. We have found that the timeliness and readability of such input are particularly important factors in whether or not it is used.

Feminist activists have argued that gender-inclusive policies (laws, legislation, NGO guidelines, multi-lateral operational framework) are inevitable and necessary as an aspirational framework for gender equality. Such policies, though, are unlikely to change social relations and practice immediately; they may be thwarted by agencies that fail to understand or agree with the legitimacy of the changes; and implementing individuals may harbor the same social norms and cultures that new policies seek to change. Nevertheless, these laws can be used as resources in struggles in 'advocacy politics' and as bargaining power in everyday politics and strategic domains of people's lives (Schroeder 1999; Nemarundwe 2005; Rao 2017). However, as Agarwal (2010) points out, focusing only at the very local level may be ineffective in bringing about sustained changes since decisions are often made at higher levels out of the reach of local agents. Chant and Sweetman (2012) point out that gender and social inequalities are an outcome of structural inequalities, which need addressing, not just by marginalized individuals and groups, but also by development agents, governments and society.

Attention to intersectionality poses some dilemmas for policy development. An intersectional approach to vulnerability to climate change, for instance, can help combat generalized statements about women's 'universal vulnerability', as well as better target policy interventions at those particular groups of women and men who are most vulnerable. Similarly, it may alert us to groups at particular social locations whose voices are not heard in policy and decision making.

On the other hand, approaches that focus on identifying the ‘most vulnerable’ risk encouraging identity-political competition for political attention. Emphasizing locations over power structures also risks inviting categorical policy responses, which run the risk of essentializing differences among groups. Consider for example the ‘Zero Tolerance for Barbaric Cultural Practices Act’,²⁶ tabled by the Canadian Minister of Citizenship and Immigration in 2014. The Act aimed to curb ‘barbaric’ cultural practices, such as ‘honor-based violence’ and forced marriage. These practices were, of course, already illegal according to existing legislation, but Canadians feared the practices would increase due to the influx of immigrants from cultural backgrounds that included the disapproved practices.

This example illustrates two important points. On the one hand, patriarchy may take different forms across ethnic/cultural spectra, and produce specific forms of patriarchal violence experienced by women (or men) at certain points of intersection.²⁷ It is important to highlight this, as combating different forms of patriarchal violence might require different approaches and resources. On the other hand, however, by isolating certain practices from the larger structural issue of patriarchal violence in Canadian society, the Act risks conveying an image of gender-based violence as a particular problem for certain demographic groups. By doing so, it may reproduce colonial

ideas portraying certain cultures as backward and ‘barbaric’, while allowing dominant groups to brush off patriarchal violence as ‘someone else’s problem’. This could in turn lead to resources being shifted away from addressing the patriarchal violence experienced by women of dominant groups. Instead of encouraging broad-based collective action against patriarchal violence, for instance, such ideas and policies may instead create divisions between different identity groups.

The challenge is therefore to make use of intersectional approaches to better structure policies to the needs of the marginalized and vulnerable, while situating those policies within broader normative projects for social and economic equality. This will require a thorough analysis of the different levels at which social divisions operate and intersect (for instance, through the five lenses proposed in this manual), as well as broad-based consultations especially with marginalized groups (Yuval-Davis 2011) in order to avoid misrepresentation and to ensure their voices are heard in the policy process. As argued by Yuval-Davis:

“[T]he boundaries of the dialogue should be determined by common political emancipatory goals while the tactical and strategic priorities should be led by those whose needs are judged by the participants of the dialogue to be the most urgent” (Yuval-Davis 2011, 206).

26 See e.g. <http://www.cbc.ca/news/politics/canada-election-2015-barbaric-cultural-practices-law-1.3254118>

27 See e.g. Shirwadkar (2004) for a discussion of the situation of abused Indian immigrant women in Canada.

5 Conclusion

In this manual, we have explained what intersectionality is, provided a brief overview of key literature, included a variety of cases to help clarify how it functions in forested environments, and put forth some useful steps in conducting research that takes intersectionality into account.

In closing, we stress two additional issues to bear in mind: positionality and reflexivity; and the role and relevance of intersectional analysis for empowerment efforts.

Positionality recognizes the importance of people's own identities and social positions in their interpretations of the world around them. It is a critical element in our rejection of the idea of true objectivity; and it is particularly important in studies relating to gender and other social phenomena, wherein any researcher has his/her own identities and cultural norms, assumptions, expectations, etc. that affect her/his understandings of what is observed.

Reflexivity has many meanings, but here we refer to the self-analysis and revelation that are helpful to a reader in interpreting the positionality (and thus some of the biases and assumptions) of the researcher/author. We stress these two concepts because they are not common in the forestry world at large; yet they are very important for understanding, analyzing and reporting on intersectionality. Without such awareness, a kind

of blindness can result, one that has been so detrimental to women and other marginalized groups. Forest women's forest-based work has been invisible; the voices of pygmy men and women unheard; and domestic tasks unseen, because of this kind of blindness.

The second issue pertains to one reason for addressing intersectionality. The stress in this manual has been on identifying and working with individuals and forest communities that are marginalized in multiple ways. But we see this not so much as an attempt to find and deal with the most marginalized, the 'vulnerability Olympics' mentioned earlier; but rather as a prelude to pro-active and collaborative empowerment efforts that can enhance equity among those living and working in and near forests. We see the investigation of intersectionality as a means by which we can gain a more nuanced understanding of the challenges and opportunities that people face in particular contexts in relation to particular events (such as forest management efforts). Looking at the institutions that maintain these inequitable systems can help us pinpoint where we need to allocate our effort or lend support in existing movements for inclusive change. Intersectional analysis is a means by which women and others – in all their variety – can be more effectively and equitably integrated into thinking and action in the world's forests.

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Annex

1. An early partial attempt at intersectionality (Jambi, Sumatra)²⁸

For three years an Adaptive Collaborative Management (ACM) team worked with women and men in the village of Baru Pelepat in Jambi Province of Indonesia to collaboratively develop management systems that would respond both to local human and forest needs. Researchers examined a variety of social differences and tried to take such differences into account. But intersectionality remained underattended.²⁹

The team abandoned an earlier hope of focusing considerable attention on a hunter–gatherer ethnic group, the Orang Rimba. The group’s mobility complicated working with them while simultaneously working with the larger village population. There was insufficient interaction to assess the cognitive disadvantages this group suffered (though lack of formal schooling suggested one type of cognitive disadvantage). Colfer’s casual interaction showed Orang Rimba fear and uncertainty in interaction with more dominant groups (confirmed by Sandbukt and Ingold 1988; Persoon 1989, attributed their fears to earlier rapes of Orang Rimba women and slavery).³⁰ Some members of other ethnic groups made fun

of them in their presence, showed clear disdain for the Orang Rimba through marginalizing jokes and engaging in other disrespectful behavior.³¹ The Orang Rimba were stereotyped as primitive, backward and unintelligent, despite broad acknowledgment of their knowledge of the forests in which they lived. They were reputed to have tails, and know magic that could lure a person into the forest, never to return. No rights to their traditional forest homeland were recognized by the state, which considered all forests part of the National Forest Estate. The Orang Rimba and their settled neighbors now have an agreement regarding use of the forest and other natural resources, developed in the 2000s as part of NGO and CIFOR collaborative activities (*Hutan Desa*, described below). Their mobility complicates provision of governmental infrastructure common in settled communities (schools, cooperatives, some health care).³² Lack of formal education combined with their remote and transient homes made involvement in formal wage labor unlikely, even if they were able to overcome their compatriots’ prejudices. Although earlier ethnographic research suggests a comparatively gender equitable traditional context (despite formal rules specifying male superiority, Sandbukt and Ingold 1988), we can add nothing about current gender patterns or dynamics.

In the settled community, the team made a first slice, working with the local community to examine and build on men’s and women’s involvement in forest and other natural resource management by locals (Minangkabau and Melayu) and transmigrants (mainly Javanese). The needs

28 Special thanks to Trikurnianti Kusumanto for her expert advice on this Annex.

29 This team did an excellent job. Factors that prevented their attending to these issues included: a demanding schedule as they ‘tested’ the ACM approach, a national context where talking about ethnicity was disapproved of, and Islamic religious strictures that discouraged interaction with the predominantly animist Orang Rimba.

30 Dentan (2008) relates similar experiences among the Semai of Malaysia.

31 However, Kusumanto reports the impressive personality and dignified demeanor of the leader of one Orang Rimba group with Minang ancestors, in interaction with villagers.

32 Keller (2015) considers rural residence itself a marginalizing factor.

of both women (in homogeneous fashion) and men were addressed, usually separately, in small groups working toward group-determined goals. Local men (and some women) attempted to map and gain management control over an area of forest that the community wanted to protect (*Hutan Desa*). Women worked on managing a fishery and developing weaving of forest fibers into baskets for sale. These women, over time, gained in self-confidence, a willingness to speak publicly, networking and conflict management skills, and a greater sense of agency overall, despite a social context that explicitly proclaimed women's inferiority (see e.g. Kusumanto et al. 2005).³³

Although we know more about conditions and interactions in the settled community than among the Orang Rimba, we do not know the very likely influences of ethnicity and wealth on interactions and decisions made within any of these groups. Was the male leader of the local settled community always Minangkabau or Javanese, for instance? Did women whose husbands were closely aligned with the community's political leaders have stronger voices? Were young women or old women disempowered within this group? These are questions that need answers, if we hope to design equitable management plans.

The community included the long-settled Minangkabau inhabitants, Jambi inmigrants from the local province or other Sumatran provinces, and Javanese transmigrants. As the work progressed, the conflicts among these groups became clearer. Reflection and learning meetings (regularly scheduled for participants to review their progress toward their goals) focused on this issue; and together some progress toward greater mutual understanding was obtained. However, conflicts became obvious also between the male customary leader and the villagers. Interestingly, over time as facilitation progressed, an attitude of solidarity developed between settlers and local villagers opposing this leader's arrogance.

The ACM team recognized the need for equitable community representation. They developed 'nested

platforms' to strengthen the likelihood of good and equitable representation. Representatives were selected from these groups:³⁴ original inhabitants of Minangkabau descent, settlers (Javanese transmigrants, migrants from Jambi and other Sumatran provinces), village elites, youth, customary institution, village government and women's organization. This is more equitable representation than most such platforms; however, the ways that these categories interact within any of these groups is likely to be as important as the interactions among them. Among the youth, for instance, were male youth dominant? Or perhaps only wealthy youth? Would the Orang Rimba have felt free to speak up in mixed contexts such as these? Dealing with the power issues inherent in intersectionality will require explicit attention to these social differentiations and associated representation.

Proper attention to intersectionality will also require looking outside the community. All lead ACM team members in Jambi, for instance, were from Java (though not all Javanese), meaning that they may have had an intuitive understanding of the Javanese transmigrants' perspectives, and possibly less of the matrilineal Minangkabau's political, cultural and land tenure systems.³⁵ The lead researchers were also directly affiliated with CIFOR, which was funding the work (another source of power within the team and between the team and the community). Colfer worried that these advantages might influence the decisions made, such that powers emanating from Java (the center of national power) might be (yet again) adversely affecting local communities in these Outer Islands. Kusumanto, however, points out that these possibilities were reduced by the active roles of mostly Minangkabau facilitators from local NGOs who played important roles in decision making. Colfer's fears are not irrelevant in many such contexts, where researchers or extension agents are from ethnically dominant groups in a given country.

In sum, even in this example, which was unusually attentive to local social and cultural variability, the teams did not provide some crucial information

33 In a cross-site comparison among the 30 ACM sites globally, this site scored second from the least gender differentiated (1, with 5 being most gender-differentiated) on four dimensions: clear division of space (2); strict division of labor (1); strong male dominance (2); and hostility to women in public arenas (1; Colfer 2005a, 138).

34 Orang Rimba were not included in these activities.

35 We do not see intersectional characteristics as the only issues of relevance. Clearly, research discipline, experience and personal interests are also important.

for good and equitable management of the local forest. The ethnic group most intimately knowledgeable about and dependent on forest resources was hardly included at all in the work. Although women, as a general category, were included, differentiations among them (old–young,

Minangkabau–Jambi–Javanese, wealthy–poor, politically connected–unconnected) were not noted, meaning that differences in power, capability and access to benefits could not be incorporated adequately into planning.

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The forestry sector has engaged with gender issues to the extent that including 'women' mattered for sustainable forest management and other forest-related goals. More recently, there has been a growing recognition that gender equality is a goal in its own right; and accordingly, considerable efforts and resources are now being devoted to 'mainstreaming gender' in forestry. While these are positive developments, 'gender' is still interpreted in simplistic and binary ways. This has prevented a deeper and more meaningful analysis of how power relations operate to situate women and men in different forested landscapes; why certain individuals and groups are, or remain, marginalized; and what role research can play in promoting gender and social justice. One of the major reasons behind this shortfall is the gulf between applied research and gender theories. Gender research in forestry has yet to engage with the concept of 'intersectionality,' or intersecting and interacting identities, even as the term is viewed as a gold standard for research in gender studies. This manual aims to introduce 'intersectionality' to researchers working on forestry and agroforestry who are unfamiliar with the term, and to provide tips and strategies for applying it in their own work. Practitioners and policymakers who are concerned with using evidence to inform gender-inclusive programs and policies would also find this manual useful. We provide a brief and accessible overview of the major approaches and debates surrounding the term in gender studies. In applying the term, we propose a five-lens approach (cognitive, emotional, social, economic and political) to identify who the marginalized are and what sustains their marginalization. We point to the value of being attentive to questions of 'positionality' and 'reflexivity' in our research; and of supporting marginalized individuals and communities to bring about socially inclusive change.



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