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# Comparative equality and diversity: main findings and research gaps

Alain Klarsfeld
*Toulouse Business School, University of Toulouse, Toulouse, France*
Eddy S.W. Ng
*Dalhousie University, Halifax, Canada*
Lize Booysen
*School of Leadership and Change, Antioch University, Oak Ridge, North Carolina, USA*
Liza Castro Christiansen
*Business Academy Aarhus, University of Applied Sciences, Aarhus, Denmark, and*
Bård Kuvaas
*BI Norwegian Business School, Oslo, Norway*

## Abstract

**Purpose** – This is a special issue introduction on cross-cultural and comparative diversity management (DM). The purpose of this paper is to present five articles that explore and examine some of the complexities of equality and DM in various countries around the world.
**Design/methodology/approach** – In this introductory paper, the authors provide an overview and the current state of literature on comparative research on equality and diversity. The authors also gathered a list of indices that is helpful as secondary data for informing comparative and cross-national research in this domain.
**Findings** – To date, comparative work involving two or more countries is scarce with Canada/USA comparisons first appearing in the 1990s, followed by other groupings of countries a decade later. Existing comparative work has started to uncover the dialectics of voluntary and mandated action: both complement each other, although the order in which they appear vary from context to context. This work also acknowledges that there are varying degrees of intensity in the way that legislations may constrain employer action in encouraging a more diverse workforce, and that there is more than a binary choice between blind equality of rights (identity blind) and quota-based policies (affirmative action) available to decision makers.
**Originality/value** – The comparative nature of these papers allows the reader to compare and contrast the different approaches to the adoption and implementation of DM. The authors also draw attention to several areas in cross-cultural DM research that have been understudied and deserve attention.
**Keywords** Transnationalism, Diversity management, Comparative study, Cross-cultural management, Equality diversity and inclusion
**Paper type** Research paper

## Introduction

Cross-national research on equality and diversity gained prominence following a delineation between cross-national and intra-national diversity (Tung, 1993). Early writings on equality and diversity took on a national perspective, with a focus

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on equality legislations (e.g. employment equity (EE) in Canada, equal employment opportunities in the USA, and equal opportunities in the UK) (Agocs, 2002). Subsequent research began comparing a small number of countries (Jain *et al.*, 2003; Agocs and Osborne, 2009) on some aspects of equality legislations, such as the advancement of women. It is widely acknowledged that equality legislations vary from country to country. For example, in some countries, the focus is on outcome measures such as quotas, "reservations" or "set-asides," as is the case of Malaysia or India. In other countries, greater emphasis is placed on the change process, with the use of goals and timetables to generate progress, such as in the USA and Canada. Early writers pointed to the fact that even though some progress had been made, there is still room for improvement for marginalized groups such as women, racial and ethnic minorities, persons with disabilities, and people of various "origins" or characteristics. It is important to note that these marginalized identities are country specific and differs from country to country (e.g. "Bumiputras" in Malaysia, "Dalits" and scheduled tribes in India, migrants in Europe, "first nations" and "visible minorities" in Canada, and "designated groups" for affirmative action (AA) in South Africa).

In this special issue on cross-cultural and comparative diversity management (DM), we present five articles that explore and examine some of the complexities of equality and DM in various countries around the world. The comparative nature of these papers allows the reader to compare and contrast the different approaches to the adoption and implementation of DM. In this introductory paper, we first provide an overview and the current state of comparative research on equality and diversity. We also gathered a list of indices that is helpful for informing comparative and cross-national research in this domain (a full list of presented in Appendices 1 and 2). We then present the key findings for each of the five papers. Finally, we conclude with some thoughts for future research.

## A review of comparative research on equality and diversity

### *The emergence of DM as distinct from earlier concepts in the USA and Canada*

Early emphasis in the equality and diversity literature was placed on equality or equity, rather than on diversity. DM as a distinct concept from equality first emerged in the USA (Thomas, 1990; Thomas and Ely, 1996; Kelly and Dobbin, 1998; Edelman *et al.*, 2001), and around the same time in Canada (Agocs and Burr, 1996). DM purports to be a new paradigm that is different from equal employment opportunity (EEO) and AA, in that it aims to embrace other strands along which people may differentiate each other, i.e., experience, study curricula, cognitive styles, beyond gender, origin, age, and disability which are the legally protected characteristics (Thomas, 1990; Thomas and Ely, 1996). Members of majority groups are included under the banner of diversity, while they were excluded from EEO and AA.

DM also emphasizes managerial discretion as opposed to legally mandated action. Advocates for DM tout the business case for diversity, i.e., the intrinsic business benefits that accrue from its implementation. Others are more skeptical and argue that DM practices are not empirically different from EEO and AA practices, but rather are similar to "old wine in new wineskins" (Kelly and Dobbin, 1998). With more positive overtures, DM narratives are presumably more palatable to managerial ears than the guilt-laden ones carried by the rhetorics of equality, AA and non-discrimination (Edelman *et al.*, 2001). The shift from EEO/AA to DM represents a managerialization of anti-discrimination practices in the workplace.

As Canada follows closely behind the USA in tackling issues of employment discrimination and in embracing DM, it is of little surprise that two Canadian authors,

Agócs and Burr (1996) authored one of the first fine-grained cross-national comparisons, contrasting not only the difference between DM and EEO/AA, but also the difference between a distinctly Canadian concept of EE from the previous two. Justice Rosalie Abella, who authored the report on EE in Canada, deliberately coined the term "EE" to distinguish the Canadian policy from the US EEO/AA (Abella, 1985). According to Agocs and Burr, EEO, AA, and EE are mandatory policies to redress the demographic under-representation of marginalized groups in the workplace, whereas DM is a voluntary approach to managing diversity in the workforce, with an emphasis on learning. More recently, there is increasing recognition that multicultural teams result in conflicts and team cohesion, but increase creativity and satisfaction (Stahl *et al.*, 2010). This in turn, provides further impetus for DM.

### Beyond North America, national country studies

Similar to EEO, AA, and EE, DM has achieved international recognition beyond North America for the last ten years (Oswick and Noon, 2014). Depending on the country, DM grew after, in parallel, or even before the development of a national legal framework, usually through multinational activities (e.g. Alhejji *et al.*, 2016), increasing recognition of intra-national diversity (Tung, 2008), as well as the influence of activists locally (Evans-Case and Givens, 2010). DM, in itself, undergoes a process of translation, when transported from one continent to another (Boxenbaum, 2006; Calás *et al.*, 2009).

Since 2000, there have been numerous attempts to empirically study equality and diversity efforts outside of the USA and Canada. At the qualitative end of the research spectrum, when country context is acknowledged or is even the focus of the research, it is based on country-specific contributions but with no comparative focus (Calás *et al.*, 2009; Omanović, 2009; Klarsfeld, 2009, 2010; Klarsfeld *et al.*, 2014). In these works, there is an acknowledgment that diversity and DM have spread to different parts of the world and that country-specific contributions are needed to explore the various interpretations of diversity, and relatedly, equality, equity, AA, and positive action. Beyond the business case narrative, the dimensions of diversity vary, along with political discourses and corporate responses on the focus of "diversity." For instance, in the USA, race and ethnicity are central to understanding ongoing debates about equality and later diversity (Lillevik *et al.*, 2010), while gender has sometimes been less acknowledged, let alone the intersection of gender and race/ethnicity. In contrast, Sweden has historically prioritized gender equality in debates and policies since the 1940s, whereas race and ethnicity have only gradually "emerged" as a hotly debated dimension throughout the 1990s (Omanović, 2009; Kalonaityte *et al.*, 2010). DM goes hand in hand with the emergence of this debate in North America and other countries of continental Europe, particularly in light of immigration and the recent refugee crisis (Klarsfeld, 2009).

### The need for more comparative work

To date, comparative work involving two or more countries is scarce with Canada/US comparisons first appearing in the 1990s, followed by other groupings of countries in the years 2000 (Agocs and Burr, 1996; Agocs, 2002; Jain *et al.*, 2003; Agocs and Osborne, 2009; Omanović, 2009; Özbilgin *et al.*, 2010; Klarsfeld *et al.*, 2012, 2016). This scarcity lies at the root of why this special issue came into being. Existing comparative work has started to uncover the dialectics of voluntary and mandated action: both complement each other, although the order in which they appear vary from context to

context. For instance, there has been a long period of mandated EEO and AA programs in the USA, the UK, and Canada, before DM was introduced in the 1990s in the USA at a time when there was fear the equality law would be dismantled (Kelly and Dobbin, 1998). In continental Europe, voluntary and mandated programs have progressed in parallel and are a lot more recent, dating back to the 1990s with the earliest recorded "translations" of DM (Kalonaityte *et al.*, 2010). This comparative work also acknowledges that there are varying degrees of intensity in the way that legislations may constrain employer action in encouraging a more diverse workforce, and that there is more than a binary choice between blind equality of rights (identity blind) and quota-based policies (AA) available to decision makers.

## The indices

In order to encourage great scholarship on comparative DM, we draw attention to several indices that is helpful as secondary data for facilitating future research. Indices are constructed from quantitative or qualitative secondary data obtained from national governments and international organizations such as the International Labor Organization and the United Nations (UN) consistent with policies pursued by these international institutions (ILO, 2014; OHCHR, 2015; United Nations, 2016). At the quantitative end of the spectrum, there are indices that cover one or more dimensions of diversity for a large number of countries. Most of these indices are based on quantitative data such as income, life expectancy, labor market participation, and participation in government. Examples of UN indices include: the Human Development Index, Gender Inequality Index, Gender Development Index, the Forbes Diversity index, and the Gender Equity Index of Social Watch.

Some more recently constructed indices are based on qualitative data derived from legislations, and helps bridge the gap between quantitative and qualitative comparative research. For instance, the Economist Intelligence Unit has built measures of women-friendly policies based on such a source of qualitative information as the ILO report on maternity and paternity rights (Addati *et al.*, 2014). The SHRM Global Diversity Readiness Index and the Gender Economic Opportunity Index, both designed by the Economist Intelligence Unit, and also the MIPEX index (Migration Policy Index) developed in the EU, and the MPI (Multiculturalism Policy Index) developed in Canada, use measures based on qualitative comparisons of national policies. The EU Gender Equality Index uses a mix of both quantitative and qualitative data. These indices are based not only on demographic data but also on national policies and represent a leap forward compared with previous indices as they attempt to capture much wider complexities in qualitative narratives. These efforts, however, may be criticized for oversimplifying the reality that they try to encapsulate, but they nonetheless constitute important work. A list of indices is presented in Appendix 1 and examples of continual used to build these indices are presented in Appendix 2.

## Research gaps

The contributions in constructing indices and current qualitative comparative literature have limitations. Their unit-of-analysis is generally at the national level, and do not cover within-country data, and are therefore ill-equipped to analyze within-country variations. This is problematic as many countries – particularly for countries with a large expanse and diverse cultures – such as Canada, India, Russia, and the USA.

For example, Ravenswoods *et al.* (2016) have to analyze data from New Caledonia and French Polynesia in the South Pacific individually, as they are considered as a part of larger "France," and do not appear on any international indices. New Caledonia and French Polynesia are French overseas "territories," which are autonomous (since the end of the 1990s) from the central government, and AA policies implemented here are not applicable in France[1]. Such focussed, within-country comparative research is therefore necessary to bring to light contexts and insights that do not exist in current international indices.

Indices and country-based literature adequately cover the societal level, which is noteworthy, but they fail to consider the meso-level understanding of diversity efforts within-country, industrial sectors, and corporations. Previous literature involving such meso-level comparative data is almost non-existent and is much needed. In this special issue, Traavik and Adavikolanu's work on business student perceptions across India, Norway, and the Czech Republic, or Caven *et al.*'s article on the architect profession in France, Spain, and the UK, are good examples of addressing this meso-level analysis, be it at the corporate or the sectorial level. Bacouel-Jentjens and Castro-Christiansen (2016) study of two corporations based in Denmark and France, and Stringfellow's (2016) work on France, Germany, Sweden, and the UK are other examples of meso-level analyses of DM work.

Furthermore, attempts to combine societal and other levels such as ethnic, organizational, and individual levels in DM studies is a challenging and important avenue for future research. The lead article by John Berry in this special issue provides an attempt to link the societal context, the institutional context, with meso-level (i.e. the ethnic/culture level) and individual-level perceptions and behavior. It bridges acculturation with equality and diversity literature following a review of his own research. The article by Fabian Jintae Froese, also in this special issue, addresses the influence of culture on the impact of corporate-based DM initiatives and the creation of an inclusive climate. Other contributions in this special issue are presented in greater detail in the next section.

Before introducing the articles in this special issue, we would like to position their contributions with regards to cross-cultural research in general. Cross-cultural research takes as its object ethno-cultural differences and includes studies comparing several cultures, be it cross-national or not (Tung, 1993). Hofstede's (1984) work on cultural values is a seminal in this area. Another noteworthy contribution is the Global Leadership and Organizational Behavior Effectiveness Project (Tsui *et al.*, 2007; Tung and Verbeke, 2010). Cross-cultural research may be the result of cross-boundary research, but can also be performed within countries as many countries include several cultures and ethnicities within their borders (Tung, 2008), as in the case for Canada, France, or the USA (Cox *et al.*, 1991; Le Bras and Todd, 2012; Ng and Tung, 1998). Cross-national research on the other hand attempts to compare data across several nations. Comparisons may bear on culture, but also on a wide range of other dimensions such as economic and social data (Kohn, 1987; Mullen, 1995). It is therefore appropriate to characterize the five articles included in this special issue as cross-national rather than cross-cultural. Two articles, by Berry and by Froese, sit at the intersection of both fields of research. Berry's article on acculturation compares "societies" that are delimited by national boundaries, such as Canada, France, and Germany. Froese's article draws on Hofstede's "national cultures" framework referred to above, and assigns cultural differences to nations rather than to intra-national entities.

## Contributions to this special issue

### *Equity and diversity*

Berry seeks to describe and analyze two features of multicultural societies: equity and diversity. He argues that both these features are necessary for multicultural societies and their institutions to be successful. Diversity is understood to include variations in culture, ethnicity, religion, age, gender, and sexual orientation. Equity is understood to include inclusive participation and the removal of barriers to such participation. Diversity without the opportunity for equitable participation can lead to a form of separation; equity without diversity can lead to a form of assimilation; the absence of both can lead to marginalization; and the presence of both can lead to a full integration. Berry distinguishes between three meanings of multiculturalism; as demography; as policy; and as ideology. He proposes a conceptual framework to illustrate the various ways in which intercultural relations may take place at three levels (society, institutions, and individual), for both the dominant and minority groups. His analysis reveals three principles needed for success in such societies: the multiculturalism principle; the integration principle; and the contact principle. The implications are manifold. First is the requirement that multicultural policy and practice focus not only on diversity, but equally on inclusive participation. Second, public education about the double-nature of multiculturalism (cultural diversity and equitable inclusion) needs to be articulated so that all members of the society can understand and appreciate this complex vision. Third, social contact hypothesis, which has been repeatedly assessed and found to be largely valid, suggests that more contact is associated with more positive intercultural encounters and outcomes. Fourth, implicit in the multicultural vision at the country level is the notion that national identity can and should incorporate diversity. The integration/multicultural strategy is usually associated with greater levels of personal well-being. Finally, construing multiculturalism in abstract terms and in relation to broad goals reduce the extent to which diversity was viewed as threatening by members of dominant groups; conversely, highlighting the concrete ways in which multiculturalism can be achieved increased perceptions of threat. This presents challenges for the accommodation of diversity and puts a greater onus on governments to balance the benefits of multiculturalism with its costs. Despite these challenges, the author believes that multiculturalism policy and programs will provide a solid basis for making intercultural relations more positive for all.

## Culture matters: the influence of national culture on inclusion climate

Froese provides a comprehensive review of the diversity and inclusion literature and a conceptual multi-level model where inclusion climate mediates the positive relationship between diversity and inclusion management (practices) and innovation at the organizational level. His model predicts that each of Hofstede's (Hofstede, 2001; Hofstede *et al.*, 2010) cultural dimensions positively moderate the relationship between diversity and inclusion management, and inclusion climate at the organizational level. For instance, the relationship between diversity and inclusion management, and inclusion climate is stronger in feminine and egalitarian cultures than in masculine and/or high power distance cultures. The model also predicts that the moderating role of cultural dimensions is stronger in cultures characterized as tight compared to cultures characterized as loose (Gelfand *et al.*, 2006). Froese's article contributes to the diversity and inclusion literature by explaining how and why national cultural values may facilitate or constrain organizational efforts to foster an inclusive climate. In addition, by incorporating cultural tightness-looseness in the model, Froese's model

can assist researchers and practitioners in drawing implications for how organizations can design and implement diversity and inclusion management practices in different cultural contexts.

### A cross-national study of gender diversity initiatives in architecture: the cases of the UK, France, and Spain

Caven *et al.* examine gender diversity initiatives in the architecture profession in UK, France, and Spain. The study examines how EU directives aimed at providing gender equality are transferred into practices in different ways in the three countries, with a particular emphasis on initiatives designed to encourage women into architecture within an industry known for its lack of gender equality (Caven and Astor, 2013). By investigating a single profession within a single industry across the three countries, the probability of competing explanations caused by industry-specific idiosyncrasies is reduced. Through 66 semi-structured interviews with female architects, the authors provide an in-depth analysis of reasons for the failure to achieve significant gains toward gender equality. The authors describe how the three countries have adopted different national approaches to gender equality, and highlighted the differences in sector initiatives and the roles played by the architecture professional bodies. Although in all the three countries, the number of women entering architectural education exceeds 50 percent, women still represent less than 30 percent of registered architects (22 percent in the UK, 25 percent in France, and 29 percent in Spain) due to environmental factors. Accordingly, the different approaches in the three countries do not fully explain the lack of gender equality in the architecture profession. The study describes similarities and differences among female architects in the three countries. There were similarities with respect to why the respondents had chosen a career in architecture across the three countries, although only Spanish architects reported that it was unpleasant to visit construction sites. The authors conclude that the common theme in all three countries is that the initiatives almost exclusively focus on women alone and that the lack of a "critical mass" of female architects makes such initiatives less effective. Therefore, male architects need to provide the impetus for change. The authors argue that to increase the number of female architects, the respective professional bodies in the three countries need to take a more proactive approach.

### Attitudes toward diversity: evidence from business schools students from Norway, India, and the Czech Republic

Traavik and Adavikolanu examine diversity attitudes among 234 business school students from Norway, India, and the Czech Republic. The diversity of the workforce is increasing as more women are entering the labor market, international career mobility is becoming more prevalent, along with increased migration from developing to industrialized countries. This makes research on diversity attitudes essential for organizations. For multinational organizations, research on diversity attitudes across national contexts becomes particularly important. Based on descriptions of the three national contexts, Hofstede's (2001) cultural value dimensions, and rankings of inequality and gender equality, Traavik and Adavikolanu develop hypotheses about differences in diversity attitudes across the three countries. The Workplace Diversity Survey developed by DeMeuse and Hostager (2001) was used to measure the general attitudes and perceptions of diversity at the workplace. As hypothesized, students from

The Czech Republic and Norway had more positive diversity attitudes than students from India. Although diversity attitudes among Indian students were the lowest of the three countries, it should be noted that their diversity attitudes were still positive. This finding lends support to current thinking that international awareness of the value of diversity is increasing. Contrary to the hypothesis, Czech students had significantly more positive diversity attitudes than Norwegian students. No gender differences were found across national contexts, although female students had more positive attitudes than male students in Norway. Across national contexts, students who had taken a diversity course had more positive diversity attitudes than those who had not. Finally, Traavik and Adavikolanu observed positive diversity attitudes across the national contexts, an observation they see as promising for international companies that are implementing diversity practices across nations and cultures. In addition to the relatively rich descriptions of the three national contexts and the findings, the article provides a review of prior research on diversity attitudes.

**Understanding religious diversity: implications from Lebanon and France**

Al Ariss and Sidani investigate how national history has influenced the formulation and practice of religious diversity strategies in organizations in France and Lebanon. The authors' analyses of the French and Lebanese cases reveal that the use of religious diversity weakened the adoption of equality and inclusive managerial practices more than enhanced it. This is due to the way that the French colonial power deployed and organized religion in their home country, which contrasted with how they deployed and organized religion in Lebanon. The former resulted in the failure of "blind neutrality" in France, and the latter resulted in positive discrimination in Lebanon, both of which do not serve diversity objectives. French laws implement no accommodation for religious diversity in the workplace, while Lebanon has a quota system for religious representation in senior public sector positions, and implicit norms for representation at lower level positions. Based on Berry's typology, it is appropriate to describe the French way of accommodating religious differences as assimilation, and Lebanon's as separation, where both countries do not reap the full benefits of religious diversity. Based on the authors' analyses, neither France nor Lebanon ensures more inclusion of diverse constituencies in general. Benefits that would accrue from ensuring religious inclusion in the workplace include an improvement in the quality of teamwork among diverse workers, and a greater willingness among people with different religions to participate more in public life, among others. This topic is very relevant and timely in the light of an influx of migrants from the Middle East, who are escaping terrorist attacks and in search of a new life in Europe. The challenge of integrating refugees and immigrants is more pronounced in light of the current situation, and the Al Ariss and Sidani paper serves as a reminder to both governments and organizations of their responsibilities to successfully integrate new migrants. Religion, more than race or skin color, shapes an individual's values and although "Europeanizing" (or assimilation, based on Berry's typology) a minority may be preferred, the peaceful co-existence of several groups in a "community of (different) communities," (or integration, according to Berry) starting with the acceptance of religious diversity, should rather be encouraged. Religious diversity in the workplace is an under-researched topic in management and organization studies. The authors also make recommendations to legislators, public policy makers, and organizations on how they can encourage, advance, and support religious diversity.

## Conclusion and directions for future research

This special issue is intended to fill a gap and serve as a catalyst to encourage greater scholarship on cross-cultural and comparative research in DM. As we have alluded to earlier, a major barrier for scholars working in this area is a lack of comparable data, which limits their ability to engage in cross-country work. To that end, we have provided a list of indices gathered from various sources, which can be a source of secondary data to facilitate comparative work. The work of Zoogah (2016) is emblematic of the use of such secondary data in cross-national research.

In addition, we would also like to draw attention to several areas in cross-cultural DM research that have been understudied and deserve attention. So far, we have only highlighted comparative DM research, which is undertaken to compare and contrast the policies and practices related to DM in two or more countries. However, DM research has only recently started to take on a transnational perspective (Calás *et al.*, 2009). Transnational research is one that transcends or spills across national borders (Kohn, 1987). Social justice movements such as "Occupy Wall Street" and the "Arab Spring" are examples of phenomena that spread across borders rapidly, and can potentially inform DM literature on how equality and diversity issues can diffuse from one country to another, and across continents. Likewise, the spread of oppressive (or progressive) cultural practices by migrants to Western societies will necessitate a transnational approach to understand the origins of these practices and how they may be perceived or accepted in Western liberal societies (Ercan, 2015). For instance, migrants may bring with them practices that are deemed oppressive to women, but also establish religious co-existence and tolerance in the host country as a result. The degree of acculturation by migrants, and tolerance by host country nationals may depend on the host country's philosophy on immigrant integration (see Berry, this issue, on marginalization, separation, assimilation, or integration) and their cultural values (see Froese, this issue). Such complexities deserve careful research efforts in the future.

Relatedly, another emerging area of transnational research focusses on the rising nationalism in the workplace. However, unlike past research that concerns illegal migrants (such as Mexicans illegally entering the USA and are accused of taking away jobs from Americans), this renewed sense of nationalism is often directed at professional and managerial "high status" workers. For example, Greth and Köllen (2016) reported strong anti-Germanism in Austria, based on both positive and negative stereotypes of Germans, which in turn has led to ostracism and social exclusion of Germans. Other examples of nationalism and anti-foreign worker sentiment may also persist for Americans working in Canada, or Namibians working in South Africa.

A third area of research is examining public discourse of diversity-related issues (e.g. accepting refugees from war torn countries), which can generate strong influence on public opinions and in neighboring countries. This public discourse is often undertaken by politicians, civil society actors, media, and far right parties not in government. As an example, German Chancellor Angela Merkel's pronouncement that "[…] multiculturalism […] has failed" has also prompted British Prime Minister David Cameron and former French President Nikolas Sarkozy to echo Ms Merkel's sentiment (cf. Ng and Bloemraad, 2015) despite the fact that multiculturalism – as exhibited and practiced in Canada – has never been implemented in these countries. The positive narrative on the acceptance of refugees by Canadian Prime Minister Justin Trudeau, however, did not appear to register in US public discourse. Recent rhetoric by certain

candidates during the US primary elections suggests that the USA is more influenced by European populism than by Canadian multiculturalism on this issue. Therefore, it is unclear if and how political rhetoric in one country influences the public discourse in another neighboring country. In this regard, it would be fruitful to examine how political discourse can shape public opinions on issues related to equality and diversity within and beyond national borders.

In closing, we hope this special issue on cross-cultural and comparative DM will act as a catalyst for greater scholarship in the future.

## Note

1. Both have locally elected governments and New Caledonia has gained autonomy on employment legislation among others. French central government retains core functions such as justice, police, and defense. A referendum on self-determination is to be organized by 2018 in New Caledonia. Source: www.collectivites-locales.gouv.fr/statuts-nouvelle-caledonie-et-polynesie, accessed April 1, 2016.

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## Appendix 1. Diversity-related indices

### Global diversity indices

*Human development index of the United Nations*

Created in 1990, "the Human Development Index (HDI) is a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living. The HDI is the geometric mean of normalized indices for each of the three dimensions." For further information, see: http://hdr.undp.org/en/content/human-development-index-hdi

Although it is not strictly speaking a global diversity index, we have chosen to draw attention to this index as we consider that it attempts to summarize the outcomes in terms of life expectancy, educational attainment and income, economic and social justice policies, covering the widest possible range of countries (187). It addresses an important concern for equality, diversity and inclusion scholarship, namely, inequality. Additionally, it serves as a basis for calculation of other diversity indices, such as the gender inequality and gender development indices (outlined below). Thus, the HDI can be considered as the first attempts to quantify national performance levels in terms other than GNP per inhabitant. It's possible disaggregation by gender makes it a primary tool for constructing multi-country gender equality indices.

*Forbes global diversity index*

Commissioned by the Forbes business magazine and published in 2012, the Forbes global diversity index ranks demographic diversity among employees in 50 countries using a composite index comprising gender, language, age, part-time vs full time, education, income inequality, sector, migrant talent. For example, gender diversity is assessed by female employment and activity rate, share of women on boards, and women in parliament. Age diversity is measured by the percentage of persons above 65 in activity (participation rate). Income diversity is measured by the ratio between the top 10 percent earners and the bottom 10 percent and is strictly speaking a measure of income inequality. Migrant talent is measure by the share of migrants in the workforce. Forbes global diversity index was published once, based on data collected in 2011. Asides from grading countries, Forbes index also purports to grade the demographics within 14 sectors and nine core occupations taken from the International Standard Classification of Occupations (Forbes, 2012).

*SHRM global diversity readiness index*

The Society of Human Resource Management (SHRM) is the US body representing the HR profession in this country. SHRM commissioned the Economist Intelligence Unit in 2008, to produce SHRM global diversity readiness index. As compared to the Forbes global diversity index, SHRM global diversity readiness index goes beyond demographics, and also considers qualitative data about policies and practices at both the organizational and societal levels in 47 countries. It assesses national diversity demographics, on workplace inclusion, social inclusion, government inclusion and legal framework indicators (Economist Intelligence Unit, 2009).

National diversity demographics include, male/female population ratio, immigrants as a percentage of total population, religious diversity, ethnic and racial diversity, percentage of the population over 65, income inequality as measured by the Gini coefficient, number of official or major languages. Workplace inclusion indicators trace such metrics as glass ceiling for women and "minorities" understood as ethnic, age, religion, disability and sexual minorities, female workforce participation, gender pay equity and meritocratic remuneration practices. Social inclusion indicators focus on ethnic, racial, religious tensions, openness to migrants, gays and lesbians, educational attainment of women and minorities, importance of education in public spending, importance of religion in country politics. Government inclusion and legal framework indicators include political participation of women and minorities in government, anti-corruption measures and respect for human rights, anti-discrimination laws protecting women and minorities, laws in favor of maternity leaves, laws protecting immigrants, quality of the judiciary and civil liberties. Typically, to perform such quantification efforts, qualitative data such as that available from the European Union and other government sources are necessary.

## Indices on specific dimensions of diversity

### *Gender equality*

Of all the diversity dimensions mentioned in both global rankings above, and apart from income disparity that tends to be the focus of much research in economics, gender is the dimension that has generated the most attention.

#### *Gender inequality index of the United Nations*

A complement to the Human Development Index, "The GII measures gender inequalities in three important aspects of human development – reproductive health measured by maternal mortality ratio and adolescent birth rates; empowerment, measured by proportion of parliamentary seats occupied by females and proportion of adult females vs males aged 25 years and older with at least some secondary education; and economic status expressed as labor market participation and measured by labor force participation rate of female and male populations aged 15 years and older" in 155 countries. The GII measures the human development costs of gender inequality, thus the higher the GII value the more disparities between females and males."

For more information, see: http://hdr.undp.org/en/content/gender-inequality-index-gii

#### *Gender Development Index of the United Nations*

With enough data about 148 nations covered by the Human Development Index, "GDI measures gender gap in human development achievements in three basic dimensions of human development: health, measured by female and male life expectancy at birth; education, measured by female and male expected years of schooling for children and female and male mean years of schooling for adults ages 25 and older; and command over economic resources, measured by female and male estimated earned income." For more information, see: http://hdr.undp.org/en/content/gender-development-index-gdi

#### *Gender equity index of social watch*

Initiated in 2007 by the NGO Social Watch and covering 187 countries, "the Gender Equity Index (GEI) measures the gap between women and men in education, the economy and political empowerment. Social Watch computes a value for the gender gap in each of the three areas in a scale from 0 (when for example no women is educated at all and all men are) to 100 (perfect equality). The GEI, in turn, is the simple average of the three dimensions. In Education, GEI looks at the gender gap in enrollment at all levels and in literacy; economic participation computes the gaps in income and employment; empowerment measures the gaps in highly qualified jobs,

parliament and senior executive positions. […]The GEI measures the gap between women and men, not their well-being. Thus, a country in which young men and women have equal access to the university receives a value of 100 on this particular indicator. In the same fashion, a country in which boys and girls are equally barred from completing primary education would also be awarded a value of 100."

For more information, see: www.socialwatch.org/node/14366

*Global gender gap report of the world economic forum*

"Since 2006, the World Economic Forum has been quantifying the magnitude of gender-based disparities and tracking their progress over time […]the Global Gender Gap Index seeks to measure one important aspect of gender equality: the relative gaps between women and men, in four key areas: health and survival, educational attainment, economic participation and opportunity and political empowerment." (World Economic Forum, 2013, p. 7). In all there are 14 indicators. To be included, a country must have data available for a minimum of 12 indicators out of the possible 14. The 2013 edition covers 136 countries out of 200 that were considered for inclusion, resulting from the fact that for the remaining countries, data was missing on three indicators or more. The list of indicators is provided in the Appendix 2.

For more information, see: http://reports.weforum.org/global-gender-gap-report-2014/

*Gender economic opportunity of the economist intelligence unit*

This index created in 2010 comprises 26 indicators covering 113 economies and purports to measure economic opportunities available to women, both as entrepreneurs and as employees. The 26 indicators are grouped into 4 main components: labor policy and practice, access to finance, access to education and training, women's legal and social status. Indicators comprise 5 to 12 points, based on how much the country provides certain types of welfare service, or has gone far in the implementation of a set of ILO conventions. Extensive arguments based on qualitative scientific grounding is proposed to explain the design of each indicator based on data made available by international institutions such as the ILO, the United Nations, and the European Union.

An example can be provided that clearly spells out how qualitative information is turned into a quantified measure. "Research suggests that the guarantee of maternity leave, particularly paid leave, will raise women's participation in the labor force before giving birth and increase the likelihood of a return to work when the leave ends. However, who pays the benefits also matters, since employers are more likely to hire women if maternity leave is provided under a universal system financed by taxes or insurance than through one in which the employer shoulders the full amount. Hence, a sophisticated maternity leave indicator has been included in the benchmarking model that takes into account both these aspects, as well as the length of maternity leave provided." See: www.voxeu.org/article/2010-women-s-economic-opportunity-index

Details of the maternity leave indicator and how this translates into points can be found in Appendix 2. It provides a good example of how qualitative comparative research such as that provided by the ILO on maternity and paternity leave (see below) are turned into metrics. Details on the ILO data on maternity and paternity leave are provided in the next paragraph.

*Maternity and paternity at work report by the ILO*

Addati *et al.* (2014) document policy and practices across 185 nations with regards to the existence of a provision on granting women the right to maternity leave, whether or not pay has to be maintained during that period, whether or not the employer is liable to provide this pay as opposed to if public funding available, and whether there is a similar possibility for parenting (rather than childbirth), i.e., parental leave as opposed to maternity leave for the purpose of adoption, healthcare and childcare provisions, protection

against discrimination, as well as breastfeeding provisions. For further information, see: www.ilo.org/wcmsp5/groups/public/—dgreports/—dcomm/—publ/documents/publication/wcms_242615.pdf

*Gender equality index (GEI) of the European Union*

A further evidence of the concern for context is the design of a European-specific gender index. Indeed, the EU actively fosters gender equality through a range of directives and the European Commission found that existing gender indices to be inadequate for the monitoring of gender inequalities in the EU. The GEI index is tied to policy-making at the EU level. It is designed to assess change following introduction of gender equality goals.

The European Commission proposed to introduce an assessment tool on gender equality in the Roadmap for Equality between Women and Men 2006-2010, and subsequently included it in the Action Plan of its Strategy for Equality between Women and Men 2010-2015. The creation of the assessment tool was undertaken by the European Institute for Gender Equality (EIGE) since the start of its operations, in June 2010." (EIGE, 2013, p. 2). The GEI, which was first published in 2013, grades the 27 member states of the European Union and takes into account more variables than its UN counterparts in order to build a more comprehensive index suited to the European policies and ability to collect data, including qualitative data, something that somehow hampered earlier, more international indices. Variables are grouped in six domains: work, money, knowledge, power, time, health. In addition, there are two "satellite" indices measuring violence against women and intersecting inequalities affecting, for instance, the disabled, lone parents or caregivers, a first-ever occurrence in gender equality monitoring tools.

**Immigrants and multiculturalism**

*Migrant Integration Policy Index (MIPEX)*

Rather than a demographic index, MIPEX grades countries according to how friendly their policies are toward integrating migrants. MIPEX today encompasses 38 countries along 167 indicators in eight policy areas. Indicators are qualitative measures designed to reflect participating countries' policies against "best practice" policies. The eight policy areas are labor market mobility, family reunion for foreign citizens, education, political participation, permanent residence, access to nationality, anti-discrimination, health. These eight areas each result from the addition of scores on four dimensions, themselves resulting from the addition of the constituting indicators. "A policy indicator is a question relating to a specific policy component of one of the eight policy areas. For each answer, there are three levels possible (100 points, 50 points, no points) (defined by qualitative definitions). A maximum of 100 points is awarded when policies meet the highest standards for equal treatment." For further information, see: www.mipex.eu/methodology. An example can be found in Appendix 2.

The first edition was published in 2004 and covered the then 15 EU member states. The second edition was issued in 2007 and concerned the then 25 EU member states. Since the 2011 edition, MIPEX also includes non-European countries alongside European ones: Australia, Canada, Japan, New Zealand, Norway, Serbia, South Korea, Switzerland and the USA. See: www.mipex.eu/history

*Multiculturalism policy index*

Undertaken under the leadership of Queen's University (Kingston, Ontario, Canada), "the Multiculturalism Policy Index is a scholarly research project that monitors the evolution of multiculturalism policies in 21 Western democracies." Multiculturalism Policy Index,

Index is based on eight indicators in 21 countries: the EU-15 member states, Western EU member states prior to 2004, Norway, Japan, Australia, New Zealand, Canada and the USA. The eight indicators are constitutional/legislative/parliamentary affirmation of multiculturalism, adoption of multiculturalism in school, exemption from dress codes, inclusion of ethnic representation/sensitivity in the mandate of public media or media

licensing, allowance of dual citizenship, funding of ethnic group organizations or activities, funding of bilingual education or mother-tongue instruction, AA for disadvantaged immigrant groups:

> The project is designed to provide information about multiculturalism policies in a standardized format that aids comparative research and contributes to the understanding of state-minority relations. The project provides an index at three points in time – 1980, 2000, 2010 – and for three types of minorities: one index relating to immigrant groups, one relating to historic national minorities, and one relating to indigenous peoples. The Multiculturalism Policy Index and supporting documentation are freely available for researchers, public officials, journalists, students, activists, and others interested in the topic (www.queensu.ca/mcp/, accessed June 3, 2015).

**Religion**

*Religious diversity index by PEW research*

The religious diversity index by PEW Research attempts to measure how diverse different countries and regions of the world are with regards to the religious mixes among their populations. South-East Asia appears to be the most diverse region, followed by Africa, Europe, North America, with Middle East and Latin America scoring lowest:

> "The methodology used by Pew Research to calculate the levels of religious diversity was developed by former senior researcher Brian J. Grim in consultation with other members of the Pew Research Center staff, building on a methodology that Grim developed with Todd M. Johnson, director of the Center for the Study of Global Christianity. The RDI is a version of the Herfindahl-Hirschman Index, which is used in various fields to measure the degree of concentration of human or biological populations as well as organizations. The main difference is that RDI scores are inverted so that higher scores indicate higher diversity." (Pew, 2014)

## Appendix 2

| List of the 14 indicators of the Gender Gap Report by the World Economic Forum Subindex | Contributing variable |
|---|---|
| Economic participation and opportunity | Female labor force participation/male value |
| | Wage inequality between women and men for similar work (female/male) |
| | Female estimated earned income/male value |
| | Female legislators, senior officials and managers/male value |
| | Female professional and technical workers/male value |
| Educational attainment | Female literacy rate/male value |
| | Female net primary enrollment rate/male value |
| | Same ratios for secondary and tertiary enrollments |
| Health and survival | Sex ratio at birth (converted to female/male ratio) |
| | Female healthy life expectancy/male one |
| Political empowerment | Females with seats in parliament/males |
| | Females at ministerial level/males |
| | Number of years of a female head of state (last 50 years)/male value |

**Source:** World Economic Forum (2013, p. 5)

**Table AI.** Sample of indicators derived from indices

**Example of one of the 26 indicators of the women's economic opportunity index of the Economist Intelligence Unit**

"This is a composite maternity and paternity leave and maternity benefits coverage indicator that is based on information from the listed sources (ILO Social Security Online and coding by Economist Intelligence Unit). The scoring is as follows:

0 = No paid maternity leave (regardless of length of maternity leave)

1 = Employer-funded benefits (regardless of length of maternity leave)

2 = Mixed systems (contributions from both employers and public funds) and less than 14 weeks maternity leave

3 = Mixed systems (contributions from both employers and public funds) and at least 14 weeks maternity leave; or less than 14 weeks maternity leave, with maternity leave benefits covered by social insurance or public funds

4 = At least 14 weeks maternity leave, with maternity leave benefits covered by social insurance or public funds

Countries score bonus points if they have schemes in place for entrepreneurs. That is, if countries have mixed systems for entrepreneurs, an additional 1 point is added to the scoring system above.

If they have public funding of maternity leave for entrepreneurs (social insurance or public funds) an additional 2 points are added to the scoring system above.

Countries will score one extra bonus point if a country's government mandates paternity leave.

The maximum score a country can receive is 7, where 7 = most favorable."

Source: Women's Economic Opportunity report, 2010, p. 128.

**Example of one the 167 MIPEX indicators**

Immediate access to labor market: What categories of foreign residents have equal access to employment as nationals?

A. Permanent residents.

B. Residents on temporary work permits (excluding seasonal) within period of $\leqslant 1$ year.

C. Residents on family reunion permits (same as sponsor)".

100 points: All of A, B and C have equal access.

50 points: A and (C or certain categories of B) have equal access.

0 points: Only A has equal access or none have.

**Example of one the eight multiculturalism policy index indicators**

Exemptions from dress codes (either by statute or court cases)

Yes: Country has granted exemptions or accommodations on religious grounds.

Partially: Some exemptions have been granted, but others have been explicitly denied.

No: Country does not grant exemptions or accommodations on religious grounds.

**Corresponding author**

Eddy S.W. Ng can be contacted at: edng@dal.ca