JustGESI

A Handbook on Applying Institutional Ethnography to Advance Gender Equality and Social Inclusion in the Energy Sector

October 2026

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This handbook has been prepared as part of the UKRI Ayrton Challenge Programme funded JustGESI (*Mainstreaming Gender Equality and Social Inclusion for a Just Energy Transition in Ethiopia, Malawi, Mozambique, and Tanzania*) research initiative. The views presented in this report are those of the author and do not necessarily represent the views of any of the JustGESI research project funders or partners or author's affiliated organisations.

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ISBN number is: 978-1-83709-651-0 (Vektor Publishing)

Suggested Citation

For the Handbook
Thebe Limbu, Sangita. 2026. *A Handbook on Applying Institutional Ethnography to Advance Gender Equality and Social Inclusion in the Energy Sector*. JustGESI, University of Sheffield.

For Chapter 4: The JustGESI Institutional Ethnography Methodological Framework
Thebe Limbu, Sangita, Vanesa Castán Broto, and Aran Eales. 2026. Applying Institutional Ethnography in the Energy Sector: The JustGESI Methodological Framework. In *A Handbook on Applying Institutional Ethnography to Advance Gender Equality and Social Inclusion in the Energy Sector* by Sangita Thebe Limbu, pp.33-43. JustGESI, University of Sheffield.

Acknowledgements

JustGESI (*Mainstreaming Gender Equality and Social Inclusion for a Just Energy Transition in Ethiopia, Malawi, Mozambique, and Tanzania*) is a three-year interdisciplinary research initiative funded by the UKRI Ayrton Challenge Programme, and this handbook was produced as part of that work. I am grateful to the project funders for their support.

I also extend my sincere gratitude to the JustGESI partners in Ethiopia, Malawi, Mozambique, and Tanzania, whose active engagement in discussions on Institutional Ethnography has been invaluable in shaping the methodological framework presented in this handbook. In particular, I would like to acknowledge the following JustGESI colleagues for their generous support and contributions (listed in alphabetical order): Amare Assefa, Aran Eales, Carlos Shenga, Christabel Yollanda Kambala, Florence Muheirwe, Getachew Bekele, Guday Emirie, Lindah Mwale, Lorraine Howe, Rossanie Daudi Malolo, Said Nuhu, Tatu Mtwangi-Limbumba, Vicky Simpson, Vanesa Castán Broto (JustGESI Principal Investigator), and Wilbard Kombe. I am grateful to Vanesa Castán Broto and Aran Eales for their contributions to the development of the JustGESI Institutional Ethnography (IE) Methodological Framework presented in Chapter 4 of this handbook. The list of documents outlined in the JustGESI IE methodological framework expands on an initial compilation prepared by the JustGESI Work Package 2 Malawi Team. I also wish to acknowledge the valuable contributions of Christabel Yollanda Kambala, Lindah Mwale, and Rossanie Daudi Malolo to this work.

I also attended a two-day course on Institutional Ethnography organised by the UK and Ireland Institutional Ethnography Network (IEN) in April 2025, which greatly enhanced my understanding of the Institutional Ethnography (IE) approach. I subsequently participated in an Advanced IE Workshop organised by the IEN on 12-13 May 2026, where I presented the methodological framework outlined in this handbook. I am grateful to all workshop participants for their insightful questions and comments. In particular, I would like to thank Órla Meadhbh Murray and Adriana Suárez Delucchi for the many valuable conversations on IE that informed the development of this work.

In August and September 2026, I presented the JustGESI Institutional Ethnography methodological framework at the European Sociological Conference in Warsaw, Poland, and at the Royal Geographical Society-Institute of British Geographers (RGS-IBG) Annual International Conference in London, UK. I thank all conference participants for their thoughtful questions and feedback. I am also grateful to my JustGESI colleague Serena Saligari for her reading recommendations on gender and eCooking.

While I am deeply grateful to everyone who contributed to this work, any errors or omissions remain my own.

Contents

Executive Summary **6**

1. Background **11**

1.1. About JustGESI 11

1.2. Aim of this handbook 11

1.3. Why this handbook 11

1.4. Who this handbook is for 12

2. The Context of Gender and Inclusion in Energy Research **13**

3. Institutional Ethnography **17**

3.1. What is Institutional Ethnography? 17

3.2. Key Tenets of Institutional Ethnography 19

3.2.1. Standpoint as a Starting Point of Inquiry 19

3.2.2. Texts as Coordinating Agents 20

3.3. How Institutional Ethnography Differs from Other Qualitative Methodologies 22

3.3.1. Ontological position 22

3.3.2. People as knowers, not objects of study 22

3.3.3. IE is different from ethnography 23

3.3.4. Emphasis on work 23

3.4. How Has Institutional Ethnography Been Operationalised in Existing Literature? 25

Case study 1: Negotiating UN Policy 25

Case Study 2: Community Water Management in Rural Chile 26

Case Study 3: University Audit Cultures in the UK 27

Key Takeaways from the Three Case Studies 28

3.5. Applying IE in the Global South: Important Considerations 29

Case study 1: When Clear, Reproducible Texts Are Difficult to Locate 29

Case study 2: Texts in Different Forms 30

Summary of Considerations for Applying IE in the Global South 31

3.6. How is Institutional Ethnography relevant to Gender Equality, Social Inclusion, and Energy Systems research? 32

4. Applying Institutional Ethnography in the Energy Sector: The JustGESI Methodological Framework 33

4.1. Standpoint Identification 35

4.2. Textual Analysis 35

4.3. Exploration of Lived Experiences and Work Knowledges 36

4.4 Identification and Documentation of Disjunctures 37

4.5. Mapping Text-Organised Coordination 38

4.5.1. Revisiting and Testing Boss Texts 38

4.5.2 Constructing Text–Act–Text Sequences 38

4.5.3 Examining Intertextualities 38

4.6. Mapping ruling relations 39

4.6.1. Tracing Text Circulation 39

4.6.2. Identifying Actors and Authorities 39

4.6.3. Documenting Institutional Pathways 39

4.7. Summary Table of the JustGESI Institutional Ethnography Methodological Framework 40

5. Conclusion 44

References 45

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Executive Summary

From Gender to GESI in Energy Research: Identifying the Gaps

Efforts to achieve Sustainable Development Goal 7, which calls for universal access to affordable, reliable, sustainable, and modern energy for all, rely not only on technological and economic expertise but also on holistic energy-systems perspectives that encompass political, social, ethical, and environmental considerations. As many governments and international agencies continue to strengthen efforts to reduce greenhouse gas emissions and expand low-carbon energy systems, it is increasingly important to understand the social and environmental implications of these transitions including how their benefits, burdens, and risks are distributed among different populations, communities, and ecosystems.

Existing social science research has paid considerable attention to the intersection of gender and energy, highlighting persistent inequalities within households and across organisations. Studies have examined gendered differences and disparities in access to energy; the use and adoption as well as varying perceptions and preferences of energy technologies; and the interconnections between energy access, health, well-being, and empowerment (Clancy and Roehr 2003; Ryan 2014; Johnson et al. 2020; Cellini et al. 2025; Khalid et al. 2025). At the organisational level, research has explored women's participation, leadership, and entrepreneurship in the energy sector, and the structural barriers that hinder equitable representation (Miller 2004; Baruah 2017; Barron et al. 2020; Dutta 2020). Evidence from international organisations further highlights persistent gender disparities with women accounting for only 32 percent of the global renewable energy workforce (IRENA 2019, 2025).

While this gender-focused scholarship is significant, feminist and energy justice scholars argue that equity cannot be achieved through representation alone. Instead, they call for analyses that extend beyond gender as a singular category to account for intersecting structures of power and inequality. This includes a deeper examination of how political, economic, technological, and socio-ecological systems, shaped by forces such as patriarchy, capitalism, and colonialism, influence how energy systems are designed, governed, and experienced by people with overlapping identities (Bell et al. 2020). There are also calls to interrogate the ways inequalities become embedded within energy systems through everyday interactions, normative assumptions, organisational cultures, and bureaucratic routines (Castán Broto 2024). Together, they highlight the need for methodologies capable of tracing how inequalities are (re)produced and legitimised in practice.

This handbook, therefore, introduces Institutional Ethnography as a methodological and analytical approach capable of uncovering often less visible institutional relations and deep-seated systemic inequalities, and of showing how systems of exclusion are organised so that they can be challenged to advance Gender Equality and Social Inclusion (GESI) in the energy sector.

Institutional Ethnography and Its Analytical Potential

Institutional Ethnography, first developed by sociologist Dorothy E. Smith, is a feminist research strategy that explores how people's everyday activities and experiences are coordinated and organised by social relations, often mediated through texts.

Institutional Ethnography is not simply a qualitative method; it is a distinct ontological stance (Smith 2001). Although it often draws on interviews, participant observation, textual and discourse analyses, it differs from conventional qualitative methodologies in how it frames research inquiry. Rather than beginning with an abstract theoretical problem or a top-down conceptual framework, IE starts from people's actual lived experiences and the issues they encounter, recognising them not as objects of study but as knowledgeable subjects.

It values people's expertise while also acknowledging that their activities and experiences are coordinated by broader, often invisible institutional processes. Its contribution therefore lies in tracing and revealing those otherwise hidden relations and showing how systems of exclusion and inequalities are organised, so that they can be challenged and changed (Smith and Griffith 2022:34).

There are two key tenets of Institutional Ethnography (IE): 1) The Standpoint, which refers to the starting point of inquiry grounded in the everyday experiences and work practices of people whose lives are shaped by institutional processes; and **2) Texts**, described as replicable material objects, whether printed, electronic or otherwise (Smith 2005:225), that are activated across different sites to standardise messages, reproduce organisational stability, and coordinate everyday activities and practices.

Key Tenets of IE	Explanation	Application in GESI-focused Energy Research
People's Standpoint	In IE, research begins from the everyday lives of people, recognising them as experts of their own experiences. It grounds inquiry in the standpoint of those whose lives are shaped by institutional processes, rather than in a conceptual or theoretical problem.	Applying IE entails centering the voices and experiences of marginalised energy users, workers, and communities to understand how energy policies, technologies, and organisational practices affect them in their everyday lives and activities.
Texts as Organising Tools	In IE, texts are understood not as passive artefacts but as active instruments that organise and coordinate people's lives across different sites. They connect local experiences to wider institutional structures and standardise expectations, actions, and decisions.	Applying IE entails examining how policies, technical guidelines, reporting templates, donor requirements, safety protocols, job descriptions, or other procedural and institutional documents shape inclusion/exclusion within energy organisations and energy projects.

Table 1. Two key tenets informing Institutional Ethnography (IE) and their application to GESI-focused energy research

In addition, the idea of work is also central to IE, and trying to understand what people actually do provides an important entry point for conducting qualitative interviews in IE research (DeVault et al. 2001:10). Moving beyond its conventional association with waged employment, IE proposes a **'generous conception of work'** that includes any activity carried out intentionally, requiring time and effort, and performed under specific conditions (Smith and Griffith 2022:54). This expansive view allows researchers to observe and analyse a wide range of unpaid and often invisible forms of labour such as caregiving, community organising, bureaucratic navigation, and waiting that are central to people's lives yet frequently excluded from dominant economic and policy discourses.

While IE has gained significant traction across several disciplines, including social work, higher education, nursing, and public health, it has received far less attention in energy research, despite its substantial potential. IE enables researchers to examine more closely the social relations that organise work practices and experiences in the energy sector. Rather than rely on abstract concepts such as power, structure, or patriarchy as starting points, IE asks how these relations actually operate, how they become activated through institutional processes, and how they are organised in practice.

> When we discuss discrimination in workplace practices, IE not only helps us understand how such discrimination manifests and how people experience it, but it also enables us to ask: How is this discrimination made possible? Which institutional processes, routines, or texts coordinate and sustain it? What are the possibilities for change?

Applying Institutional Ethnography in the Energy Sector: The JustGESI Methodological Framework

Institutional Ethnography (IE) is grounded in a commitment to examining how things actually work by attending closely to everyday practices, the social relations that organise them, and the texts that coordinate institutional action, but it does not prescribe fixed methods or techniques as such. IE offers a flexible framework that allows researchers to design creative methodological approaches, provided they remain focused on explicating the social relations shaping people's work practices and experiences. This openness is one of IE's key strengths, but it can also present challenges, particularly in fields such as energy research where IE has seen limited application.

Within the JustGESI research project, we have developed a structured and context-sensitive IE methodological framework tailored to studying Gender Equality and Social Inclusion (GESI) in the energy sectors of Ethiopia, Malawi, Mozambique, and Tanzania. The framework is presented as follows.

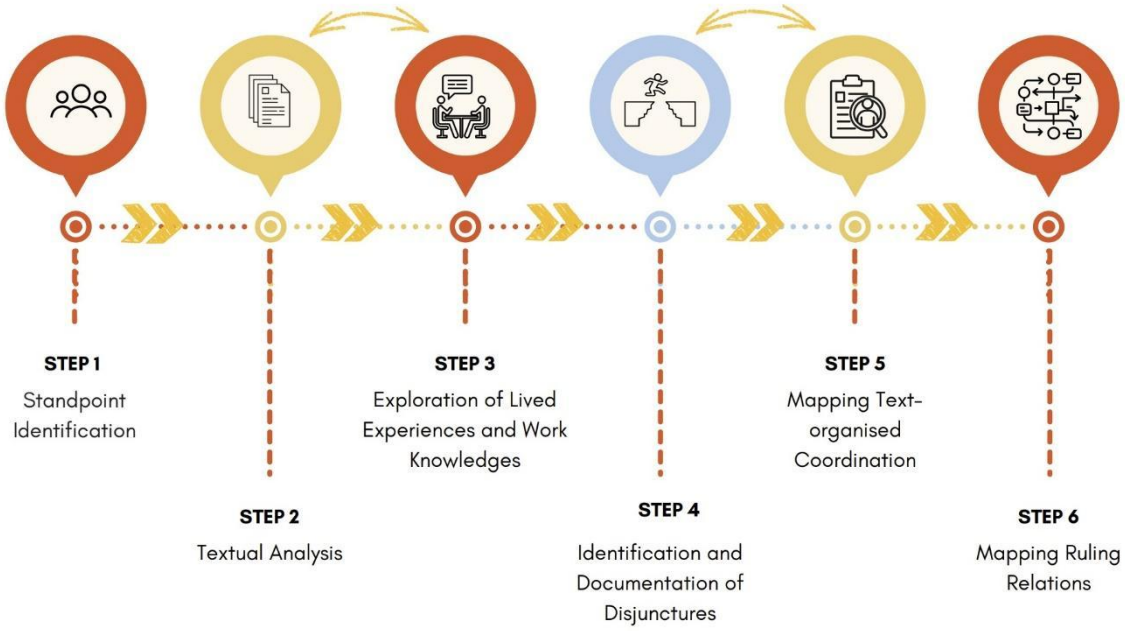

Figure 1. The JustGESI Institutional Ethnography Methodological Framework

In the JustGESI study, we have identified a diverse range of energy-focused organisations across the four selected countries, including government ministries, state agencies, public bodies, private-sector entities, membership networks, and non-governmental organisations. From this pool, we aim to select one or two organisations in which the IE research will be conducted.

Our methodological framework begins with the identification of standpoints, taking into account the perspectives of both workers and senior management within organisations involved in delivering energy transitions, as well as the standpoints of community groups, often referred to as beneficiaries, target audience, service users, or clients of the organisations under study. In considering these standpoints, **it is also essential to reflect on the researcher's own standpoint and positionality,** including their social identities, institutional embeddedness, assumptions, values, and beliefs that shape the study.

The second step involves gathering and analysing texts relevant to the organisations under study. These include documents that shape gender equality and social inclusion policies and practices within the selected organisations and across the wider energy sector. **Textual analysis is closely intertwined with the exploration of people's lived experiences and everyday work practices** through methods such as interviews, focus group discussions, participant observation, and autoethnography, focusing on how people navigate institutional settings, whether as workers or service users.

Although textual analysis and the documentation of lived experiences are presented as distinct components of the JustGESI IE methodological framework (see Figure 1), in practice they are closely interconnected. In the JustGESI study, as we are researchers positioned outside the energy organisations we study, beginning with texts provides an essential entry point for understanding the broader institutional context before moving on to understand people’s work practices and lived experiences within it.

Building on the exploration of lived experiences and the analysis of relevant texts, the next step is to identify disjunctures. In Institutional Ethnography, a disjuncture refers to a mismatch or gap between people's lived experiences and the ways those experiences are represented, organised, or coordinated through institutional texts and processes.

In the JustGESI study, particular emphasis is placed on identifying and documenting disjunctures. This reflects our interest in understanding how both discrimination and inclusion are enacted in practice, and how institutional commitments articulated in policies and organisational documents may diverge from the lived realities of those working within and engaging with the energy sector.

The next stage moves beyond identifying and documenting disjunctures to **analysing and mapping the ways in which institutional processes are coordinated through texts.** This involves tracing how people's activities are organised, regulated, and interconnected across different organisational settings through texts.

The final stage extends beyond analysing textual coordination within specific sites and focuses on how these local practices are organised by broader institutional systems operating across organisational, sectoral, and geographical boundaries. The overarching aim is to reveal the translocal ruling relations that shape people's everyday work and experiences.

Importantly, the JustGESI Institutional Ethnography methodological framework presented here is not intended as a universal model; rather, it illustrates how we have adapted IE's principles to our specific research aims, and we hope it serves as a useful reference point for researchers and practitioners seeking to advance gender equality and social inclusion across the energy sector.

1. Background

1.1. About JustGESI

JustGESI *(Mainstreaming Gender Equality and Social Inclusion for a Just Energy Transition in Ethiopia, Malawi, Mozambique, and Tanzania)* is a three-year interdisciplinary research initiative funded by the UKRI Ayrton Challenge Programme and led by Professor Vanesa Castán Broto at the Urban Institute, University of Sheffield (UK). The project brings together partner organisations across Ethiopia, Malawi, Mozambique, Tanzania, South Africa, and the UK, integrating engineering with critical social science to promote just and equitable clean energy transitions. It seeks to address the systemic exclusion of women and marginalised groups from the energy sector through three key work packages (WP): i) supporting eCooking initiatives through place-based, action-oriented research (WP1); ii) analysing structural barriers to GESI in energy governance using Institutional Ethnography (WP2); and iii) developing targeted capacity-building programmes to challenge underrepresentation and reshape energy education (WP3).

Institutional Ethnography is a core component of JustGESI's WP2, which seeks to uncover and address the drivers of discrimination embedded in social, institutional, and cultural practices, as well as those normalised within everyday work and organisational routines of key organisations in the energy sector.

1.2. Aim of this handbook

The aim of this handbook is to introduce Institutional Ethnography (IE) as a critical theoretical and methodological approach that can be applied to the study of gender and inclusion within energy research. Although IE has seen limited application in this field, we believe it holds significant potential. The handbook provides an overview of existing scholarship on what IE is, its key principles, its historical development, its theoretical foundations, how it differs from other methodological approaches used particularly in qualitative research, how it has been operationalised in different contexts, and its relevance to energy research. The handbook also presents the IE methodological framework developed by the JustGESI project.

1.3. Why this handbook

Institutional Ethnography (IE), first developed by feminist sociologist Dorothy E. Smith, offers important conceptual and analytical orientation rather than a prescriptive

methodological guide. Central to IE is the investigation of how everyday activities are organised and coordinated through extended and often invisible social relations (Smith 1987; 2005). Because these forms of coordination can be traced in diverse ways, IE researchers have employed a wide methodological repertoire to advance IE's core analytic project.

While the flexibility and openness of IE is one of its strengths, it can also pose practical challenges. For example, methodological flexibility can raise questions about comparability, scope, and analytical coherence when research teams operate across different institutional, cultural, and political contexts. Within a multi-country initiative such as JustGESI, establishing a shared methodological strategy therefore becomes essential. Such a strategy must balance two commitments: maintaining IE's central concern with how social relations are organised and coordinated, and developing a framework that enables both contextual sensitivity and cross-case comparability.

In response to these methodological demands, the JustGESI team has engaged in extensive conceptual and practical work to adapt IE to the specificities of our research context. This has involved reviewing existing IE scholarship, learning from other examples and case studies, attending IE courses and events, having extensive conversations within our team, and critically reflecting on the methodological challenges that may arise. This handbook synthesises those learnings and offers a consolidated articulation of our approach at the end of the project's first year. As IE requires iterative and reflexive engagement with institutional realities, we expect our methodological practices to continue evolving throughout the course of fieldwork. The learnings, reflections, and guidance presented here capture the provisional yet rigorous foundations of our work, shared in recognition that transparency about the research process is just as important as the findings that follow.

1.4. Who this handbook is for

This handbook is intended for JustGESI team members, as well as researchers and practitioners working on energy, gender, and inclusion who are interested in methodological approaches for examining the structural drivers of discrimination within the energy sector and/or in applying Institutional Ethnography in their own work. It also serves as a general introduction for readers seeking to learn more about Institutional Ethnography.

2. The Context of Gender and Inclusion in Energy Research

Efforts to achieve Sustainable Development Goal 7, which calls for universal access to affordable, reliable, sustainable, and modern energy for all, rely not only on technological and economic expertise but also on holistic energy-systems perspectives that encompass political, social, ethical, and environmental considerations. The concept of the 'energy transition' is increasingly framed as a shift from high-carbon to low-carbon energy sources and reduced carbon consumption (Kumar et al. 2021:1), achieved through the reduction of greenhouse gas emissions and the expansion of renewable energy. International development agencies frequently present the renewable energy sector as a catalyst for economic growth, employment, and technological innovation (IEA 2025). However, such narratives often obscure the uneven social relations and power structures that shape energy transitions. Renewable energy technologies are not inherently beneficial; their social and environmental impacts depend on how they are designed, deployed, and governed. Energy transitions therefore can generate both social and environmental benefits and burdens, with effects that are unevenly distributed across social groups and ecosystems, shaping who is included in, and excluded from, clean energy futures.

Feminist research on energy systems highlights disparities across multiple levels. At the household level, studies show gendered variations in energy access, usage patterns, and perceptions of different energy technologies, alongside uneven decision-making power over which energy products are adopted (Clancy and Roehr 2003; Ryan 2014; Johnson et al. 2020; Cellini et al. 2025). Scholars have documented how energy access, or its absence, shapes health, well-being, empowerment, and social change (Cellini et al. 2025; Khalid et al. 2025) and have also examined how energy professionals conceptualise energy access and gender equity (Alda-Vidal et al. 2023). Other work focuses on the adoption and use of eCooking technologies and the implications for women's time, labour, and opportunities (Flechtner et al. 2024; Khalifa and Bricknell 2026).

At the organisational and sectoral levels, research has drawn attention to women's entrepreneurship in energy, analysing the contributions of women-led initiatives as well as the structural barriers they encounter, from restrictive social norms to limited access to credit (Baruah 2015, 2017; Dutta 2020). Further studies examine women's participation in the energy workforce, professional experiences, and representation in leadership and decision-making positions (Miller 2004; Baruah 2015, 2017; Barron et al. 2020). However, relatively few studies examine the day-to-day operations of organisations and institutions and how they reproduce gender-based inequalities and other forms of workplace discrimination.

Reports from international organisations consistently demonstrate persistent gender gaps in the renewable energy sector. For example, according to IRENA's 2025 global assessment, women represent 32 per cent of full-time workers in the renewable energy sector, a figure that has remained unchanged since 2019. While this proportion is higher than in the oil and gas (23 per cent) and nuclear energy (25 per cent) sectors, it remains substantially below the global average of 43.4 per cent for women's overall labour force participation. Furthermore,

women are disproportionately concentrated in administrative roles (45 percent), with far lower representation in STEM roles (28 percent), non-STEM technical roles (36 percent), and medium-skilled positions such as solar installation (22 percent) (IRENA 2025:10). Participation increases to 35 percent in off-grid projects led by NGOs and community organisations, yet women hold only 19 percent of senior management or board-level positions (IRENA 2025:10).

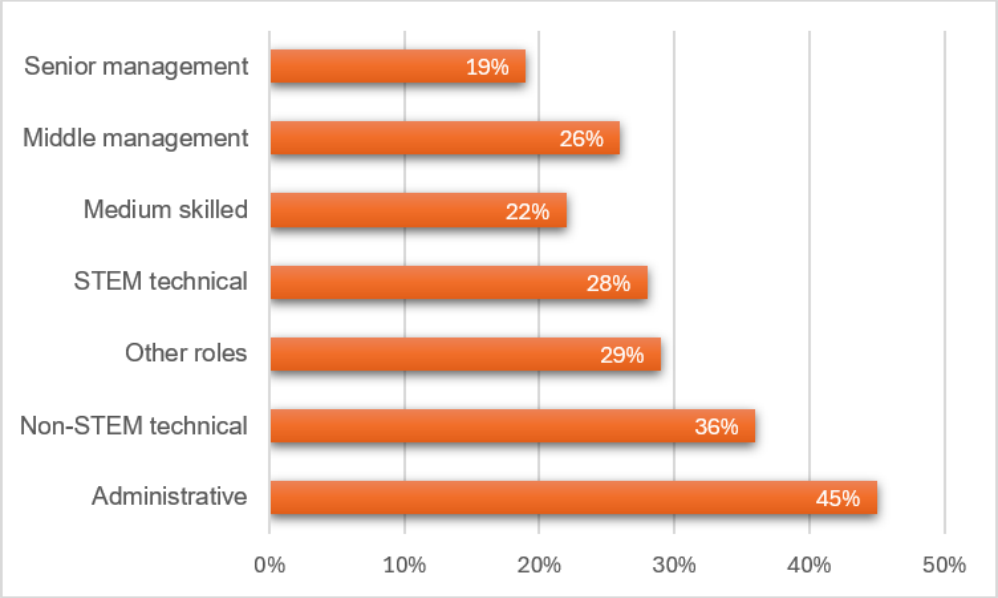

Figure 2. Female representation in full-time renewable-energy employment by role, with women accounting for 32% of the sector's full-time workforce (Data Source: IRENA 2025 Global Survey Report (2025:10))

Patterns in Sub-Saharan Africa diverge in some respects. An IFC assessment of ten Sub-Saharan African countries (Cameroon, Ethiopia, Kenya, Mali, Nigeria, Rwanda, Senegal, South Africa, Togo, and Zambia) reports that women constitute 27 percent of board members, 30 percent of CEOs, 16 percent of vice presidents, and 26 percent of middle- and lower-level managers, averaging 24.3 percent in senior leadership positions (IFC 2022:2). However, women's representation in STEM (13 percent) and non-STEM technical roles (16 percent) remains lower than global averages. The IFC further notes that women in the region are more likely to work full-time in decentralised, small-scale renewable systems such as off-grid standalone units and mini-grids, rather than in large-scale, centralised infrastructure such as major hydro, wind, or geothermal plants.

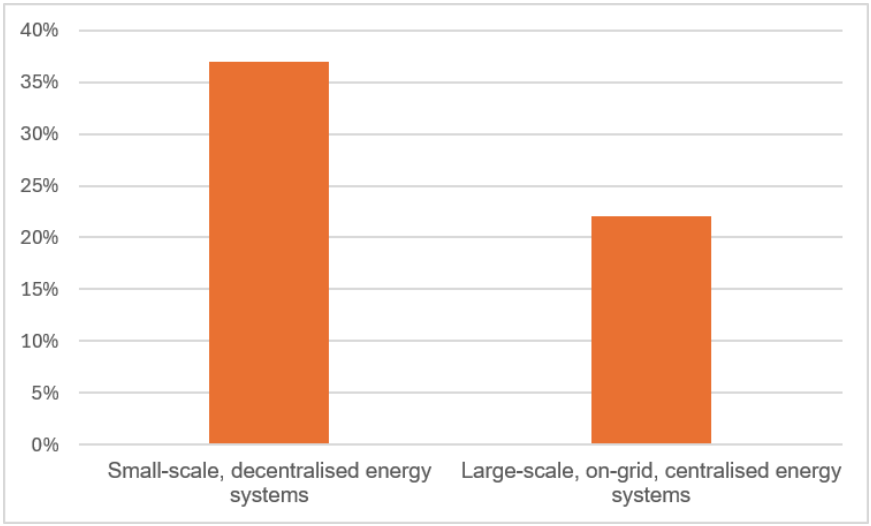

Figure 3. Women's full-time employment within different renewable energy subsectors in Sub-Saharan Africa (Data Source: IFC 2022 Report (2022:viii))

While these statistics highlight persistent gender disparities in workforce participation and leadership, they reveal little about the diversity of women's experiences within the sector. Feminist scholars have therefore argued for an intersectional approach that examines how gender interacts with class, migration status, family structures, and other social positions to shape workplace opportunities and constraints. For example, Baruah's (2017:22) research shows that middle-class women energy professionals in India and China often enjoy greater career mobility and are better able to undertake work-related travel than their counterparts in many industrialised countries. Baruah attributes this to the availability of childcare support from live-in grandparents, extended family networks, domestic workers, and the broader social acceptance of shared or 'social parenting' (Baruah 2017:24-25). These forms of support can help middle-class women manage professional responsibilities with family obligations. However, such experiences contrast sharply with those of low-income women, including migrant workers, who often lack comparable social and familial resources, resulting in more constrained employment opportunities and heightened precarity (Clancy et al. 2020). These differences highlight how inclusion within the energy workforce is shaped not only by gender but also by class, mobility, and access to social support.

Feminist and energy justice scholars argue that equity cannot be achieved through participation and representation alone. There is a growing need to expand the gender lens to account for the structural drivers of inequalities (Cornwall and Rivas 2015). This requires a deeper analysis of how political, economic, technological, and socio-ecological systems are structured through intersecting forces such as patriarchy, capitalism, and colonialism, which shape how energy systems are designed, governed, and experienced by people with diverse and overlapping identities (Bell et al. 2020). There are also calls to interrogate the ways inequalities become embedded within energy systems through everyday interactions, normative assumptions, organisational cultures, and bureaucratic routines (Castán Broto 2024). Such concerns shift attention from questions of representation alone towards the

institutional processes through which inequalities are produced, normalised, and reproduced in practice.

Understanding these processes requires methodological approaches that move beyond documenting disparities and instead examine how everyday experiences and activities are coordinated by wider institutional relations. This handbook therefore introduces Institutional Ethnography as a methodological and analytical approach for investigating how systems of power and exclusion are organised within energy institutions. By tracing the connections between people's everyday experiences and work practices and the administrative, professional, and policy processes that shape them, Institutional Ethnography makes visible the often-hidden social relations through which inequalities are produced and sustained. In doing so, it offers a means of identifying and challenging institutional barriers that hinder the advancement of gender equality and social inclusion in the energy sector.

3. Institutional Ethnography

Institutional Ethnography (IE) offers a valuable methodological approach for addressing key analytical gaps in research on gender and inclusion in energy systems. IE prompts critical questions such as: how are gendered and exclusionary social relations embedded in the routine organisation of energy systems? How are policies, regulatory processes, and everyday professional practices coordinated? And what institutional drivers reinforce or hinder efforts to achieve just and equitable energy policies and outcomes? Before exploring how IE can be applied to the study of energy systems, it is useful to first outline what IE entails, including its core principles and its ontological and epistemological commitments.

3.1. What is Institutional Ethnography?

Institutional Ethnography (Smith 1987, 2005) is a feminist research strategy that explores how people's everyday activities and experiences are coordinated and organised by social relations, often mediated through texts. It was first developed by feminist sociologist Dorothy E. Smith working closely with her colleagues and students, primarily in the context of North America (Smith 1987, 2005; Griffith and Smith 2005; Smith and Griffith 2022).

Smith (2001) describes Institutional Ethnography not merely as a qualitative method, but as a distinct ontological stance - a way of understanding the world that begins with people's actual lived experiences rather than abstract theories or top-down conceptual frameworks, and explicates the institutional processes that administers and governs those everyday actual realities and practices.

Some of the key concepts in Institutional Ethnography (IE)

1. **Institution** – By 'institution,' Smith (1987: 60) does not refer to a single organisation. Instead, Smith describes it as 'a complex of relations forming part of the ruling apparatus, organised around a distinctive function such as education, health care, or law.' Institution in IE is therefore a constellation of organisations, texts, discourses, and practices that together carry out a particular social function (Smith 2005: 222).

   Example: In energy research, institutions include the production, distribution, and consumption of energy sources, as well as the coordination of state energy departments, private utility companies, international development agencies, among others. Each of these actors operates through different texts, including policy frameworks, technical standards, and funding agreements. Yet taken together, they shape how energy is distributed, who benefits, and whose needs are overlooked.

2. **Ruling apparatus or ruling relations** – By 'ruling apparatus' or 'ruling relations,' Smith refers to the social relations that organise everyday life (Smith and Griffith 2022: 21). These relations are not grounded in personal interactions. Instead, they coordinate and standardise practices across time and space through textually mediated forms of organisation, including laws, policies, media, digital platforms, bureaucratic documents, and professional discourses.

   Example: In energy governance, ruling relations can be seen in the ways that international climate agreements, national energy policies, and corporate sustainability reports guide and coordinate the work of engineers, policymakers, and community practitioners. For instance, a woman technician working in a community energy project may find her daily activities shaped by funding criteria, reporting templates, and technical standards. These texts often originate from distant institutions and reflect dominant discourses about energy efficiency, energy transition, and economic growth. As a result, they may organise her work in ways that do not align with the priorities or values of the community she serves.

3. **Ethnography** – In IE, 'ethnography' refers to much more than participant observation or the production of in-depth accounts of people's lived experiences and perspectives. According to Smith (1988: 60), ethnography in IE is "a commitment to an investigation and explication of how 'it' actually is, of how 'it' actually works, of actual practices and relations." The focus is therefore not only on documenting experiences, but on uncovering the social relations, texts, and processes that shape and organise those experiences.

   Example: If the research centres on the experiences of a woman engineer, the aim is not limited to understanding her perspectives or interpretations of her work. Rather, it also entails tracing the institutional relations that govern her daily practices, such as professional standards, workplace hierarchies, regulatory requirements, and organisational procedures.

4. **Everyday world** – The word 'everyday' appears frequently in IE. It refers to our physical, material, and social location through which we experience the world and encounter its conditions, constraints, possibilities, and forms of agency (Smith 1987: 89). However, as mentioned above, although inquiry in IE begins from people's everyday experiences and practices, IE does not confine itself to the world as it is immediately lived (Smith 1987: 89).

   Example: An IE research begins from the experiences of low-income and marginalised communities struggling to access energy by paying attention to the everyday work community members undertake such as visiting local government offices, organising neighbourhood meetings, completing bureaucratic forms, waiting for responses from officials, as well as their perspectives on the process. Yet the inquiry cannot stop there. An IE study must also examine the bureaucratic processes, texts, discourses, and actors that coordinate and structure this work.

3.2. Key Tenets of Institutional Ethnography

Based on a review of the existing literature on Institutional Ethnography, including the work of Dorothy E. Smith and her collaborators, as well as studies that have operationalised IE in empirical research, several key tenets can be identified that form the foundation of IE's theoretical and methodological orientation. The following tenets have been selected because of their prominence in the literature and their particular relevance to questions of gender, inclusion, and energy research:

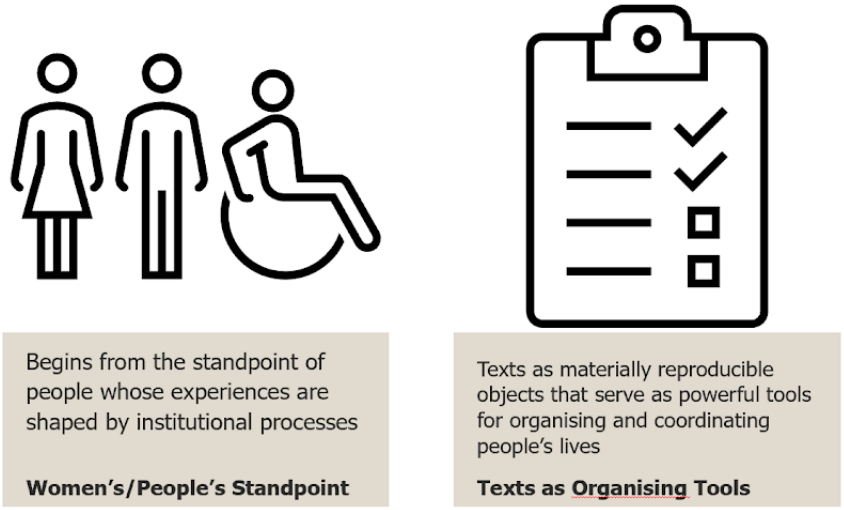

Figure 4. Two Key Tenets of Institutional Ethnography

3.2.1. Standpoint as a Starting Point of Inquiry

One of the central tenets of Institutional Ethnography (IE) is the concept of standpoint, which refers to the starting point of inquiry grounded in the everyday experiences of people whose lives are shaped by institutional processes. Rather than treating individuals as objects of study, IE recognises them as knowers of their own lives and draws on their situated knowledge to explore how their experiences are coordinated by social relations that often extend beyond their immediate context and remain invisible to them (Smith 2001: 161).

Dorothy E. Smith offers a broad interpretation of standpoint. While it is sometimes associated with particular identity categories such as gender, class, or race, Smith and her collaborators emphasise that standpoint in IE is not a demographic label. It is 'a way of directing attention to the starting place of the inquiry' (Smith and Griffith 2022: 88). It serves as an entry point from which researchers can trace how people's local, embodied experiences are shaped and organised by translocal ruling relations.

Smith (2001: 161) further explains that IE 'takes up a stance in people's experience in the local sites of their bodily being and seeks to discover what cannot be grasped from within that experience, namely the social relations that are implicit in its organization.' Beginning from the standpoint of those who are marginalised or excluded by dominant systems enables

researchers to uncover how institutional processes organise activities and experiences across different sites, scales, and moments in time.

This approach is not only methodological; it is also political. IE's inception is grounded in a commitment to build a *sociology for people* (Smith 1974, 1988), one that exposes the workings of power and opens possibilities for change by making visible the institutional relations that shape everyday life. By anchoring inquiry in a standpoint, IE offers a way to connect local lived experiences with the broader social organisation that produces them, while also creating openings for change and transformation.

3.2.2. Texts as Coordinating Agents

Another key tenet of IE is its emphasis on texts as central to the coordination of everyday life. In IE, texts are not understood as passive documents or static artefacts; rather, they are treated as active agents that organise institutional processes. Smith and Turner (2014) define texts as 'materially reproducible objects that convey meaning.' Replicability is therefore a defining feature of texts in IE. Texts, whether printed, electronic, or otherwise, can be reproduced, replicated, and activated across different sites, enabling organisations to standardise messages, authorise practices, and reproduce organisational stability (Smith 2005: 225). In this sense, texts function as material manifestations of institutions and are a primary way institutions exert influence in people's everyday lives (Smith 2005).

Texts carry institutional logics, assumptions, and priorities. As Pence (2021: 334) notes, texts 'articulate the assumptions, operating theories and concepts, and priorities of the institution' and serve as 'the primary tool for directing the actions of workers.' Their required use codifies institutionally sanctioned ways of doing things, thereby reinforcing dominant discourses and practices and shaping the conditions under which work is performed.

Crucially, texts in IE are not analysed in isolation from practice. Their relevance emerges in how they are activated in specific settings. As Smith and Griffith (2022: 65) explain, texts do not act independently; they come into operation through individuals' work and coordinate sequences of action. In other words, a text becomes analytically significant only when it is taken up and used, shaping what people do and how they do it. IE therefore shifts analytical attention from the interpretation of textual content in abstraction to the examination of how texts organise people's actions, structure institutional practices, and reproduce ruling relations. This approach challenges the idea that texts are neutral or merely informational and instead positions them as central to the social organisation of everyday practices and experiences.

Some of the key concepts in Institutional Ethnography (IE)

5. **Disjuncture and Problematic:** – Disjuncture refers to the gap between what institutional texts or discourses prescribe and what people actually do and experience (Murray 2020; Foo et al. 2021). It emerges when everyday realities do not align with institutional narratives or expectations, revealing tensions and contradictions within systems of governance. Identifying a disjuncture helps formulate the 'problematic,' or the central research agenda or question that guides IE inquiry.

   ***Example**:* Consider a government energy subsidy programme that offers rebates for solar panel installation. On paper, the policy appears inclusive and progressive. However, a disjuncture emerges when low-income, female-headed households living in rented accommodation are unable to access the subsidy because they do not own their homes or cannot afford the upfront costs. The institutional text assumes an able bodied homeowner with disposable income, overlooking intersecting barriers such as gender, class, race, disability. This disjuncture reveals how a seemingly neutral policy can reproduce inequality by failing to account for the lived realities of those most affected by energy poverty.

6. **Text-Reader Conversations:** The concept of the 'text-reader conversation' refers to the interaction that occurs when a reader engages with a text. Smith (2014: 225) describes this as a process in which readers take up the words of a text while bringing their own context, knowledge, and understanding to the act of reading. Through this interaction, texts shape consciousness and coordinate action, which means language in IE is considered performative rather than merely descriptive.

   It is important to note that while recognisable identity of a text across different sites of use contributes to its coordinating role in ruling relations, this consistency does not guarantee uniform outcomes (Smith and Turner 2014: 5). The stability of a text allows for standardisation, but its meaning and effects emerge only when it is taken up, interpreted, and activated in specific settings (Smith 2001: 175). Paying attention to text-reader conversations therefore makes it possible to see how texts organise action in situated ways.

   ***Example**:* Consider a grant application form used by a national energy agency to fund renewable energy projects. The form contains standardised sections that require applicants to outline project objectives, projected energy savings, and technical specifications. When a staff member from a local NGO completes this form, a text-reader conversation takes place. The staff member must interpret the categories presented in the form and decide how to describe their project in ways that align with what they believe the agency values. If the form does not include categories for reporting gendered impacts, such as women's energy needs, the involvement of women in project activities, or the implications for unpaid care work, the reader may omit these concerns in order to fit the project into the available fields. In this situation, the form coordinates action not only through its written content but also through how the reader interprets and responds to it.

3.3. How Institutional Ethnography Differs from Other Qualitative Methodologies

Although Institutional Ethnography (IE) uses many of the same methods as other qualitative approaches, such as interviews, participant observation, and textual or discourse analysis, it differs in several fundamental ways. These differences shape the types of questions IE enables researchers to ask and the forms of knowledge it makes possible for them to generate.

3.3.1. Ontological position

Smith (2001) argues that IE is not simply a qualitative method but a distinct ontological stance. IE directs attention toward 'the coordination of subjectivities, consciousnesses, activities, and relations among people' (Smith and Turner 2014: 7). Rather than treating 'society,' 'structure,' or 'systems' as abstract entities, IE focuses on how people's actions are coordinated through institutional processes. This ontological grounding leads IE to investigate social relations rather than conceptual abstractions. As Crawley et al. (2021: 135) note, Smith challenges the tendency of sociological theory to stabilise metaphors such as 'structure' and instead calls for an approach that examines actual, observable and non-observable relations that organise everyday life.

Questions arising from IE's ontological stance:

- How are people's activities and experiences coordinated across time and space?
- What institutional processes organise what appears as individual activity and experience?
- How do texts, discourses, and organisational routines shape social relations?

3.3.2. People as knowers, not objects of study

IE is grounded in the standpoint of actual people where people are not objects of study but subjects who hold expert knowledge of their own lives, work, and activities (Smith and Griffith 2022:34). Their accounts provide the foundational entry point for tracing how their actions and experiences are coordinated by institutional relations that often remain invisible to them. At the same time, IE rejects essentialism. The knowledge people share is not treated as representative of a category or identity group; rather, it serves as an entry point for examining the broader social relations that organise their experiences and practices (Smith and Griffith 2002: 34).

Questions arising from IE's focus on people's standpoint:

- From the standpoint of those affected, what work is involved in navigating institutional processes?
- What tensions, contradictions, or disjunctures emerge between institutional narratives and lived realities?

3.3.3. IE is different from ethnography

Although IE uses the term 'ethnography,' it differs from conventional ethnographic practice in disciplines such as anthropology or sociology with a different focus of attention. Conventional ethnography often asks questions such as: What happens here? Why does this happen? Its aim is typically to produce detailed descriptions of lived experiences, cultural meanings, and local worlds of practice. IE begins in similar places but moves in a different direction. Its goal is not simply to describe activities, experiences and perspectives but to map the social relations that organise them. Smith and Griffith (2022: 63) emphasise that IE looks beyond individual activity to examine how it is linked to the work of others, often in distant or seemingly disconnected locations. It focuses on uncovering how institutional, textual, and discursive arrangements coordinate people's activities across sites, organisations, and scales by asking: how is this happening? How is it organised? (DeVault 2026; Balcolm et al. 2021; Kearney et al. 2019). To that end, the methods of IE are not strictly limited to interviews or participant observation, it could be 'recollection of work experience, use of archives, textual analysis' with the commitment to mapping out visible and invisible social relations (Smith 1987:160).

Questions arising from IE's analytic orientation:

- How do texts organise and standardise practices across sites?
- How do institutional discourses and texts shape what counts as legitimate knowledge or action?
- How do people's local activities link to translocal relations of ruling?

3.3.4. Emphasis on work

The idea of work is quite central to IE, and it often provides a primary entry point for interviews in IE (DeVault et al. 2001:10). IE redefines the concept of work, moving beyond its conventional association with waged employment, instead it proposes a 'generous conception of work' that includes any activity carried out intentionally, requiring effort and time, and performed under specific conditions (Smith and Griffith 2022: 54). This expansive conception allows researchers to investigate forms of labour that are often invisible or

undervalued within institutional frameworks, such as care work, community organising, household administrative labour, and navigating bureaucratic processes. By situating inquiry within people's work, IE reveals how institutional arrangements shape, enable, or constrain particular forms of labour. This is especially important in fields such as energy governance, where hidden or unpaid work often plays a crucial role in energy access, policy implementation, and community participation.

Questions arising from IE's focus on work:

- What work do people have to do to navigate the institutional processes?
- How is this work shaped, facilitated, or restricted by texts, policies, and organisational routines?
- What forms of work remain unrecognised or unaccounted for in institutional frameworks?

3.4. How Has Institutional Ethnography Been Operationalised in Existing Literature?

Institutional Ethnography (IE) has been taken up across a wide range of fields and domains, including higher education (Liang and Lin 2021; Spina and Comber 2021; Murray 2022, 2025), state planning processes (Turner 2001; Ugarte 2021), and nursing and public health (Balcom et al. 2021; Foo et al. 2021). However, IE has not yet been systematically operationalised within energy research.

Although its conceptual foundations are well established, including standpoint and beginning inquiry from a problematic rooted in people's everyday experience, and tracing textually mediated coordination, there remains considerable variation in how these concepts are translated into empirical research. IE's methodological potential is promising but still underdeveloped in the energy field.

To explore how IE can be operationalised in energy research, it is useful to examine how scholars in other domains have applied its principles. The examples below do not come from the energy sector, but they illustrate how IE has been used to map institutional processes in contexts ranging from UN policymaking to community water management in Chile and audit cultures in the UK higher education sector. The focus here is not on the research findings of these studies but on how IE's methodological commitments were put into practice.

Case study 1: Negotiating UN Policy

Eastwood, Lauren E. 2014. Negotiating UN Policy: Activating Texts in Policy Deliberation. In *Incorporating Texts into Institutional Ethnographies*, edited by Dorothy E. Smith and Susan Marie Turner, p.64-89. Toronto: University of Toronto Press.

Eastwood's study examines the United Nations (UN) forest policy negotiations, focusing on specific moments in which texts were negotiated, modified, and taken up by delegates participating in UN policy processes. The study reveals how a seemingly coherent, high-level governing text comes into being through interactions among experienced delegates who draw on their insider knowledge of UN procedures and practices.

Methodological approaches:

- **Standpoint:** Eastwood adopts the standpoint of delegates from civil society organisations. The researcher's positionality was further shaped by involvement with NGOs that provided access to UN negotiation spaces.
- **Texts:** The analysis centres on how key policy documents were drafted, negotiated, revised, and refined, including attention to what concepts were included, excluded, or contested.
- **Text-reader activation:** The study examines how delegates engaged with policy texts by reading, annotating, proposing revisions, and advocating for textual changes during negotiations.

- **Ethnographic methods:** Participant observation was conducted not only in formal meeting rooms but also in informal spaces such as hallways and cafeterias, where significant informal negotiations occurred.

This study demonstrates how UN policymaking is coordinated through textual work carried out across multiple sites and by diverse actors, revealing how policy texts are actively negotiated, interpreted, and activated in practice.

Case Study 2: Community Water Management in Rural Chile

Su´arez Delucchi, Adriana Angela. 2024. Unpacking 'community water management' in rural Chile: An institutional ethnography. *Journal of Rural Studies*. doi.org/10.1016/j.jrurstud.2024.103345

Suárez Delucchi's study examines how residents in a rural region of Chile navigate community water management institutions to secure access to water within a national context where water resources are heavily privatised. Beginning from the standpoint of community members, the study traces the institutional processes they encounter, including application processes, technical assessments, administrative requirements, and interactions with community water management organisations. In doing so, the study reveals how people's everyday experiences of accessing water are coordinated by broader institutional and policy relations.

Methodological approaches:

- **Standpoint:** The inquiry begins from the lived experiences of rural residents seeking access to water, using their accounts as the entry point for investigating wider institutional processes.
- **Following the work:** Suárez Delucchi begins fieldwork within the community and then traces outward to examine the institutional relations, administrative procedures, and organisational processes that emerge from residents' experiences.
- **Interview strategy:** Interviews were conducted with a wide range of actors, including water management workers, directors, association members, non-members, and representatives of local organisations. This enabled the researcher to map the social relations connecting different institutional actors.
- **Observation:** Attendance at neighbourhood meetings provided insight into how local discussions and decision-making processes were shaped by broader institutional constraints and requirements.
- **Texts and ruling relations:** The study analyses key texts, including the Water Code, the Constitution, and the *Registro Social de Hogares* (RSH), showing how they organise institutional understandings of community needs and eligibility. These texts institutionalise particular understandings of water as a private commodity rather than a social right, shaping how community needs are institutionally assessed, categorised, and addressed.

By tracing the connections between residents' everyday experiences, institutional practices, and governing texts, this study demonstrates how ruling relations coordinate access to water and generate disjunctures between institutional assessments and lived realities.

Case Study 3: University Audit Cultures in the UK

Murray, Órla Meadhbh. 2025. *University Audit Cultures and Feminist Praxis: An Institutional Ethnography.* Bristol: Bristol University Press.

Murray's study examines how audit processes shape the everyday working lives of academics in the UK higher education sector. The research inquiry begins from the author's standpoint as a PhD student and early-career academic immersed in the daily practices and organisational environment of the university sector. Drawing on everyday experiences of academic work, the study explores how audit mechanisms are translated into routine activities, expectations, and social relations within universities.

Methodological approaches:

- **Standpoint:** Murray grounds the inquiry in their own experiences as an academic and in conversations with students, colleagues, and academics working across different universities. These everyday encounters highlighted audit processes as a recurring source of concern and frustration, which became the starting point for formulating the research problematic.
- **Texts:** Drawing on these experiences, Murray identifies and analyses three frequently cited texts associated with three major audit mechanisms that structure contemporary academic work. These texts serve as entry points for investigating how audit regimes coordinate activities across the higher education sector.
- **Following institutional processes:** Murray traces how audit texts are interpreted, translated, and enacted through everyday academic practices, examining how institutional requirements become embedded in teaching, research, administration, and grant applications.
- **Textually mediated discourse:** Murray also explores how audit processes shape the work of those who do not directly read or engage with the texts themselves. Murray examines how conversations in departmental meetings, training workshops, and informal networks transmit interpretations of audit requirements, thereby influencing behaviour, practices, and expectations.

By examining the texts, discourses, and audit mechanisms that organise academic labour, this study reveals how ruling relations are enacted through audit cultures, coordinating work across multiple sites and shaping the conditions under which academic work and knowledge are produced.

Key Takeaways from the Three Case Studies

Taken together, the three case studies illustrate how Institutional Ethnography (IE) can be operationalised across very different institutional settings. Although the research focus of each study varies, they share several methodological commitments that are central to IE and offer useful guidance for applying IE to energy research.

1. Inquiry begins from a standpoint grounded in everyday experience
Each study starts with a clear standpoint, either drawn from the researcher's own lived experience or from the experiences of communities and organisations. This standpoint provides an important entry point for identifying the issues, tensions, and institutional processes that require further investigation.

2. Everyday interactions help identify the disjuncture and problematic
Across all three studies, formal interviews were supplemented by participant observation, informal conversations, and sustained immersion in everyday settings. These interactions enabled researchers to identify points of disjuncture(s), including what people struggled with, what they frequently discussed or did not bring up, and the institutional processes that shaped their concerns. Through this grounded engagement, the problematic emerged from practice itself rather than from predefined theoretical frameworks or conceptually imposed gaps.

3. Texts are central and must be examined closely
In each case, texts played a defining role in coordinating institutional practices. IE requires researchers to identify the texts that people refer to, struggle with, or depend upon, and then trace how these texts organise their work and shape their experiences.

4. IE follows how texts are taken up, used, and translated into practice
All three studies moved beyond analysing the content of texts to examine how texts are activated in real settings. This included tracing how texts shape sequences of action, how they are interpreted or negotiated, and how they coordinate work across different locations. Texts organise action across sites, but this coordination becomes visible only through close attention to how texts are put into use.

5. Textually mediated discourse matters, including among those who have not read the texts
All three studies show that the influence of a text often extends far beyond those who read it directly. IE therefore focuses on discourse that is mediated by texts, examining how institutional expectations are circulated, interpreted, reinforced, or contested within conversations, meetings, and organisational culture.

6. IE reveals ruling relations by moving outward from local experience
In each example, inquiry begins in a local site of experience and then moves outward to map the wider institutional and translocal relations that shape it. This outward movement is central to IE and demonstrates how everyday activities are coordinated by relations that extend well beyond the immediate context.

3.5. Applying IE in the Global South: Important Considerations

While Institutional Ethnography was originally developed in North America and has been predominantly applied in Global North settings characterised by strong textual cultures and complex bureaucratic infrastructures, its application in the Global South remains limited. Adapting IE to different contexts requires careful attention to diverse institutional arrangements, informal norms and practices, varied relationships to texts and administrative systems, and, in many contexts, the enduring effects of colonial histories on governance and everyday life. The following examples demonstrate both the possibilities and challenges of applying IE in the context of the Global South:

Case study 1: When Clear, Reproducible Texts Are Difficult to Locate

Williams, Aaron, and Janet Rankin. 2015. Interrogating the Ruling Relations of Thailand's Post-tsunami Reconstruction: Empirically Tracking Social Relations in the Absence of Conventional Texts. *The Journal of Sociology & Social Welfare* 42 (2): Article 6

Williams and Rankin's (2015) study of post-tsunami reconstruction in Thailand shows how IE can still be operationalised even when researchers cannot locate the governing documents or policy texts that typically guide institutional processes. Their research was conducted retrospectively and they did not find a clear set of official documents that coordinated reconstruction activities. Instead, multiple actors were involved and no coherent policy framework was available at the field site.

In this context, the researchers turned to people's narratives and accounts of reconstruction, as well as observations of the built environment and material conditions at the field site. Features such as garbage bins, power lines, and road layouts served as clues to how reconstruction was unfolding and how it was connected to broader institutional processes. One example was the transition from traditional housing structures to permanent, standardised concrete housing, which fundamentally altered the nomadic lifestyle of the Moken People in the study area. This material shifts connected residents more closely to systems of infrastructure provision, utility billing, and administrative oversight, thereby linking everyday life to broader institutional and economic arrangements.

This case study illustrates how researchers working within an Institutional Ethnography framework can adapt their inquiry when clear, reproducible texts are difficult to locate. By beginning with people's everyday experiences and examining narratives, observations of material environments, and changes in everyday living arrangements, Williams and Rankin were able to trace connections between local reconstruction processes and broader institutional relations. The study highlights the importance of methodological flexibility and suggests that institutional relations may also be traced through material, spatial, and experiential dimensions of everyday life.

Case study 2: Texts in Different Forms

Rudrum, Sarah. 2016. Institutional Ethnography Research in Global South Settings: The Role of Texts. *International Journal of Qualitative Methods* 37 (2): 250–69.

Rudrum's (2016) study of maternity healthcare in Uganda illustrates another way IE can operate in the Global South context. Although the setting differs significantly from the highly textual environments in the Global North, texts still played an important role, although in a different form. In this case, the key text was the antenatal care (ANC) card, which shaped how women accessed maternal healthcare.

Rudrum shows how the ANC card coordinated relations between patients and health workers. Women feared that without the card they might be denied access to healthcare. Yet obtaining the card often required couples' HIV test results, a practice that could be coercive and that placed women in a position of dependency on their husbands. Many women were unable to read the card because they were illiterate or did not speak English, limiting their ability to understand, question, or challenge the information it contained. At the same time, the card guided health workers' decisions about who would be prioritised for care and who would be sidelined. Despite national policies guaranteeing healthcare access for all, the ANC card functioned as a text-mediated mechanism of compliance that coordinated interactions between patients and health workers, contributing to unequal outcomes in practice.

Rudrum also highlights the significance of 'absent texts', referring to forms of action, knowledge, and experience that are not officially recorded or documented but nonetheless shape people's lives and institutional outcomes. For example, protests against poor healthcare facilities, in which women lay on the floor demanding to meet government officials, were not documented in institutional records and received little or no media attention. Yet these actions were crucial for understanding local dynamics of accountability, agency, and resistance.

This study demonstrates that, in Global South contexts, ruling relations may not always be traceable through formal documents alone. Both documented texts and their absences can provide important insights into how institutional processes are organised and experienced in everyday life.

Summary of Considerations for Applying IE in the Global South

Applying IE in Global South contexts requires flexibility and sensitivity to the diverse ways institutions are organised. Researchers may encounter:

- limited availability of formal, reproducible texts,
- fragmented or uneven bureaucratic infrastructures,
- multilingual environments and varying literacy levels,
- significant roles played by material objects, informal practices, and unwritten norms,
- uneven access to institutions, administrative systems, or official records,
- and the enduring influence of colonial legacies that continue to shape contemporary governance and institutional practices.

Nonetheless, the core principles of IE remain relevant. Inquiry still begins with people's everyday experiences, follows the institutional processes that shape those experiences, and traces how ruling relations operate through both visible and less visible practices, texts, and social relations.

3.6. How is Institutional Ethnography relevant to Gender Equality, Social Inclusion, and Energy Systems research?

As discussed throughout the preceding sections, Institutional Ethnography provides a distinct set of tools for examining how everyday experiences and activities are shaped by wider institutional processes. This makes it especially relevant for research on gender, inclusion, and energy systems, where inequalities are often embedded in organisational routines, bureaucratic procedures, and policy environments.

IE helps move beyond broad and often abstract concepts such as power, structure, discrimination, and patriarchy by asking how these forces are organised and enacted in practice. Rather than simply identifying inequality, IE investigates the institutional mechanisms that make inequality possible. For example, when examining discrimination within an energy organisation, IE does not stop at documenting people's experiences and activities but traces the organisational policies, administrative procedures, performance metrics, informal norms, and other institutional processes that coordinate such experiences.

A central contribution of IE is its focus on mapping connections between individuals' experiences and institutional coordination. This emphasis on tracing 'paper trails,' textual processes, and sequences of action makes IE particularly suited to understanding how gendered and exclusionary outcomes are produced. In energy research, for example, this can involve following how policy documents, technical guidelines, corporate reporting systems, or donor requirements shape the everyday work of engineers, energy professionals, policymakers, and community energy practitioners, as well as the experiences of communities seeking access to energy.

IE also draws attention to the textual and bureaucratic legacies that continue to shape contemporary governance. Many energy institutions and regulatory structures have roots in colonial administrative systems that established hierarchical and technocratic forms of decision making. IE allows researchers to examine how these legacies persist through procedural rules, eligibility requirements, administrative categories, and data systems, and how they influence whose needs are recognised and whose are marginalised.

It is also important to note that IE has not yet been widely used in gender, inclusion, and energy research. This presents a methodological opportunity. The field has limited tools for tracing how gendered inequalities in energy access, participation, or policy implementation are coordinated through institutional relations. IE can fill this gap by making visible the everyday work required for people to access energy services, navigate bureaucratic systems, or participate in energy governance, particularly for women, low income households, and marginalised groups.

Finally, IE is both an analytical and political project. Its aim is not only to explain how ruling relations operate but also to support change by revealing how institutional arrangements can be re-organised. This aligns closely with feminist commitments to valuing lived experience, recognising agency, and producing research that contributes to more just and inclusive energy systems.

4. Applying Institutional Ethnography in the Energy Sector: The JustGESI Methodological Framework

Authors: Sangita Thebe Limbu, Vanesa Castán Broto, and Aran Eales

In this section, we outline the Institutional Ethnography (IE) based methodological framework developed for the JustGESI (*Mainstreaming Gender Equality and Social Inclusion for a Just Energy Transition in Ethiopia, Malawi, Mozambique, and Tanzania*) research project. IE informs the second work package (WP2) of the JustGESI project, which focuses on institutional change. JustGESI defines institutional change as addressing 'the root causes of discrimination and exclusion which shape energy practices, policy, and capacities', drawing on principles of intersectionality and feminist practice[1].

To guide this work, WP2 is structured around five research questions:

- **RQ1:** What are the structural drivers of discrimination and oppression in energy transitions?
- **RQ2:** How do policies, practices, and power dynamics influence access and participation?
- **RQ3:** What formal and informal institutional structures shape GESI policy development and implementation?
- **RQ4:** How are discriminatory practices embedded in everyday organisational routines?
- **RQ5:** What actionable strategies can promote inclusive policy reform?

Within the JustGESI project, we have developed a structured and context-sensitive IE framework tailored to studying GESI in the energy sectors of the four focused countries in East Africa. As part of the study, we have identified a diverse range of energy-focused organisations, including government ministries, state agencies, public bodies, private sector actors, membership networks, and non-governmental organisations. From these, we will select one or two organisations in each country in which IE will be operationalised.

A central focus of the JustGESI IE framework is the identification of disjunctures through the exploration of lived experiences and work knowledges, alongside the analysis of texts, reflecting our commitment to understanding how discrimination and inclusion manifest in practice. This involves examining how institutional commitments articulated in policy documents diverge from the lived realities of those working within and around the energy sector.

[1] JustGESI UKRI Project Proposal, 2024, p.16.

Although textual analysis and the documentation of lived experience are presented as distinct components of the JustGESI IE framework, in practice they are closely connected. Because we are external researchers positioned outside the organisations under study, textual analysis provides an essential entry point for understanding the broader institutional context. This enables us to then situate and interpret people's everyday activities and experiences within the wider organisational and policy environment.

All steps of the JustGESI IE framework will be conducted in accordance with the ethical guidelines of our affiliated research institutions and the provisions outlined in the Memorandum of Understanding (MoU) signed with the participating energy-focused organisations. All sensitive data will be pseudonymised and anonymised, with strict data-protection and secure-storage protocols in place. Informed consent will be obtained from all organisations, interlocutors, and community groups involved in the study.

Importantly, the JustGESI IE methodological framework presented here is not intended to serve as a universal model. Rather, it illustrates how we have adapted the core principles of Institutional Ethnography to address our specific research objectives and contexts. We hope it provides a useful point of reference for researchers seeking to advance gender-transformative and socially inclusive energy research. The JustGESI IE methodological framework is outlined below.

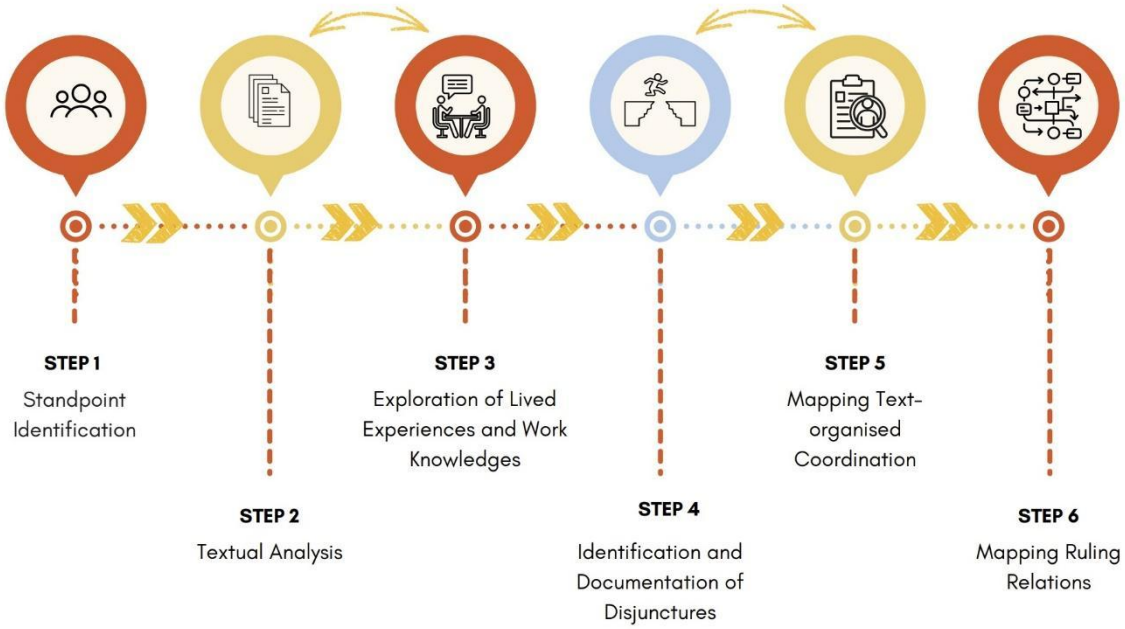

Figure 5. The JustGESI Institutional Ethnography Methodological Framework

4.1. Standpoint Identification

IE's strength lies in examining how texts and institutional practices structure people's activities and experiences. Hence, an IE analysis often requires adopting a particular standpoint of reference, against which the work of the text is examined. In the JustGESI project, we begin from the standpoints of individuals who are either working within energy-focused organisations or navigating energy access as beneficiaries of these organisations.

Within energy-focused organisations, individuals occupy different positions of authority, responsibility, and influence. To reflect these distinctions, we identify two organisational standpoints: that of workers and that of senior management. These standpoints allow us to trace how institutional coordination operates differently across hierarchical levels.

The standpoints guiding the JustGESI IE analysis are therefore:

- **The standpoint of workers and senior management within energy-focused organisations delivering energy transitions.**
  This includes individuals whose everyday work contributes to the design, delivery, and implementation of sustainable energy solutions within organisational, institutional, and policy frameworks. Their experiences provide insight into how organisational structures, texts, and routines shape decision-making and everyday practice.

- **The standpoint of individuals and communities who engage with, participate in, or are affected by the energy transition initiatives of the organisations under study.**
  These may be described institutionally as 'beneficiaries', 'target populations', 'service users', or 'clients'. Their standpoint enables us to examine how organisational commitments, policies, and programme objectives are translated into everyday experiences, opportunities, and barriers. It also provides insight into how energy transition interventions are received, negotiated, and experienced in practice.

When considering these standpoints, it is also essential to reflect on the researcher's positionality (including their social identities, institutional embeddedness, assumptions and beliefs, among others) and how this positionality shapes the research focus, influencing what becomes visible, which questions are prioritised, and how relationships with participants and interlocutors are formed.

4.2. Textual Analysis

After identifying the standpoint of inquiry, the next step in IE is to identify and gather the relevant texts that shape work and coordination within the energy-focused organisations under study. These texts include organisational strategies, GESI policies, HR manuals, project proposals, governance documents, internal communications, meeting minutes, field notes, and other informal organisational materials. In addition, external texts such as national policies, acts, guidelines, and international commitments are included to capture the broader institutional environment in which the organisations operate.

Each text is categorised and analysed to understand its origin, the practices it promotes, the assumptions it embeds, and its position within institutional coordination. Particular attention is paid to identifying 'boss texts,' which are authoritative documents that guide or regulate subordinate texts and institutional practices across settings (Smith and Griffith 2022). These authoritative texts often become visible because they are repeatedly referenced, echoed in organisational language, or invoked in decision-making practices. Identifying such texts helps to uncover the 'organisational story,' or how institutional commitments are articulated and legitimised.

Textual analysis unfolds alongside the documentation of lived experiences, which reveal how people navigate and interpret the institutional arrangements shaped by these texts. Although textual analysis and lived experience are presented as distinct components of the JustGESI IE methodological framework, in practice they develop in parallel and inform one another. In many IE studies, texts emerge as participants reference them in interviews or observations. However, in this research we place specific emphasis on beginning with texts, as they provide an essential entry point into the institutional context, particularly given our position as researchers external to the organisations we are studying.

Starting with key institutional texts therefore allows us to better situate and interpret the everyday experiences of workers, managers, and beneficiaries as the research progresses. This approach helps us understand both the formal commitments organisations make regarding gender equality and social inclusion, and the ways these commitments are activated, negotiated, or contradicted in practice.

4.3. Exploration of Lived Experiences and Work Knowledges

Alongside textual analysis, IE places strong emphasis on understanding the activities, practices, and experiences of people as they navigate institutions, whether they work within them or attempt to access their services. This involves examining people's *work knowledges*: what they do, how they do it, and how their activities are shaped or constrained by institutional processes. In the JustGESI project, two types of experiences and work knowledges are particularly relevant:

- **The experiences and work knowledges of individuals working within energy-focused organisations.**
  These include experiences of discrimination, inclusion, and professional practice, as well as insights into how everyday organisational routines shape who can or cannot meaningfully influence institutional decision making.

- **The experiences and work knowledges of those who seek access to the services provided by the energy-focused organisations.**
  This encompasses users, consumers, citizens, and community groups whose interactions with the organisation influence their access to energy and their opportunities for participation in energy transitions.

These experiences can be documented using qualitative research methods such as interviews, focus group discussions, observations, shadowing, researcher reflections and fieldwork diaries. A guiding question during this phase is 'How do you know?' (Murray 2025).

This question helps trace how individuals come to understand institutional processes and how that understanding is shaped by texts, organisational practices, and textually mediated discourses (Murray 2025).

4.4 Identification and Documentation of Disjunctures

Building on the exploration of lived experiences and textual analysis, the next step in IE is to identify disjunctures. A disjuncture refers to a point where there is a clear mismatch between people's lived experiences and the institutional or textual representations of those experiences. Disjunctures often expose contradictions, tensions, or gaps in how institutional processes are understood, enacted, or communicated.

To identify a disjuncture, textual analysis must be read alongside field notes, interview transcripts, and other documentation of everyday experiences. This comparison enables researchers to understand how institutional processes are actually navigated in practice and to reveal differences between what policies promise and what individuals encounter. These insights are essential for tracing ruling relations and understanding how inequalities or exclusion are produced. In the JustGESI methodological framework, disjunctures are analysed and documented using a three-step process (Figure 2):

- **Step 1: Define**
  Identify the contradiction, gap, or tension between what institutional texts or policies claim and the actual lived experiences of individuals within the organisation or of external beneficiaries.
- **Step 2: Explain**
  Analyse the drivers, impacts, and consequences of the disjuncture. This includes examining the institutional processes, practices, or assumptions that contribute to the gap.
- **Step 3: Describe and Document**
  Provide detailed description and evidence of the disjuncture, drawing on relevant texts, field notes, interview excerpts, and concrete examples.

Identifying disjunctures is not always a linear process. In some cases, additional disjunctures become visible only when researchers begin analysing how institutional processes are text-organised and coordinated.

Guiding questions for identifying disjuncture(s):

1. What contradictions, tensions, or gaps have you observed between the institutional texts and the empirical observations from field encounters, interviews, meetings, and autoethnography?
2. What are the moments when everyday experiences and work practices doesn't align with institutional expectations or processes?
3. What contradictions are raised in the accounts of those involved in the institutions? Are any of those contradictions visible in the institutional texts themselves?

4.5. Mapping Text-Organised Coordination

This stage moves beyond identifying and documenting disjunctures to analysing and mapping how institutional processes are coordinated through texts. It involves three analytical strategies:

4.5.1. Revisiting and Testing Boss Texts

This strategy involves returning to the texts identified earlier in the research process, including policies, legislation, strategic frameworks, reporting templates, and other regulatory documents. The aim is to assess whether these texts are activated in everyday organisational practice and whether they exert the coordinating effects suggested by interviews or observations. IE acknowledges the possibility of encountering unexpected boss texts, meaning documents or discourses that unexpectedly shape decision making and organisational routines. This step therefore evaluates: which texts are influential in practice, which are influential primarily at the level of discourse, and which are largely absent despite their formal significance (Murray 2022).

4.5.2 Constructing Text–Act–Text Sequences

This strategy traces how texts are taken up by individuals and how they enter into action. It examines how texts are read, interpreted, and applied within specific work processes, and how these actions generate new texts such as reports, meeting minutes, forms, or assessments. The resulting text–act–text sequences reveal partial chains of coordination within the institution (Smith 2005). This approach does not assume a linear or deterministic relationship between texts and action. Rather, it highlights how institutional processes unfold through the interaction between documentary authority and everyday practice.

4.5.3 Examining Intertextualities

This strategy focuses on the relationships among multiple texts that collectively coordinate institutional life. It involves identifying sequences or hierarchies of texts that underpin organisational processes, tracing how texts circulate across different settings, and examining

how they are translated or reinterpreted in practice (DeVault 2021). Attention is given to how texts move between departments, roles, and external agencies, and to how they organise work across organisational sites. This analysis reveals how institutional priorities, including gender equality and social inclusion, are reinforced, transformed, or diminished through interconnected textual processes.

4.6. Mapping ruling relations

This final stage moves beyond analysing textual coordination within specific sites and focuses on how local practices are organised by broader institutional systems that operate across organisational, sectoral, and geographic boundaries. The aim is to reveal the translocal ruling relations that shape people's everyday work. Three key analytic strategies guide this stage:

4.6.1. Tracing Text Circulation

This strategy involves following how texts travel across institutional sites and how they mediate coordination among multiple actors, including donors, ministries, utilities, frontline staff, and community members. The analytical focus shifts from how a text is used within a single setting to how it operates within wider systems of governance, regulation, and accountability. Tracing circulation helps identify which texts anchor coordination across levels and where inconsistencies, contradictions, or power dynamics emerge during movement from one site to another.

4.6.2. Identifying Actors and Authorities

This activity examines the institutional actors who activate, interpret, and enforce texts across different levels of the system. It highlights how authority, accountability, and decision making operate translocally, and how these dynamics shape the conditions under which local work is organised. Mapping actors and authorities also makes visible how institutional power is distributed and how responsibilities, mandates, and expectations travel through various administrative layers.

4.6.3. Documenting Institutional Pathways

This strategy involves mapping the wider institutional pathways through which everyday practices and experiences are coordinated. These pathways trace how different actors, sites, and activities become interconnected through ruling relations. While visual diagrams can help illustrate these connections, the primary goal is to produce an analytic account that explains how ruling relations are organised and how they shape local experiences. Documenting institutional pathways helps transform isolated observations into a coherent understanding of how institutional processes function across scales.

4.7. Summary Table of the JustGESI Institutional Ethnography Methodological Framework

Framework Component(s)	Description
1. Standpoint Identification	In JustGESI, our research inquiry begins by taking the following standpoints into account: • **The standpoint of workers and senior management** within the energy-focused organisations delivering energy transition (i.e. those whose everyday work contributes to devising and/or implementing sustainable energy solutions within institutional and policy frameworks) • **The standpoint of 'beneficiaries' or 'target audience,'** also referred as 'service users' or 'clients' of the energy-focused organisations under study (i.e. those who are navigating energy access, recognition and/or participation in energy transition projects) When considering these standpoints**, it is also essential to reflect on the researcher's positionality** (including their social identities, institutional embeddedness, assumptions and beliefs, among others) and how this positionality shapes the research focus, including what becomes visible, which questions are prioritised, and how relationships with participants and interlocutors are formed.
2. Textual Analysis	The second step involves gathering and analysing relevant texts specific to the energy-focused organisations under study. These include documents that shape gender equality and social inclusion policies and practices within the selected organisation and across the wider energy sector, such as[2]: • **National-level documents**: Policies, acts, legislation, and guidelines related to energy, gender, and/or inclusion. • **Institutional policies**: Strategic plans of the selected organisation(s) and other organisational documents addressing energy, gender, and/or inclusion. • **Operational and procedural documents**: Risk assessments, human resources manuals, standard operating procedures (SOPs), etc. • **Project and programme documents**: Project proposals, logframes, implementation frameworks, monitoring and evaluation frameworks. • **Internal communication and training materials**: Internal memos, training guides, workshop reports. • **Governance documents**: Organisational charts, board meeting minutes, etc. • **External and public-facing documents**: Stakeholder engagement guidelines, partnership agreements, press releases, website content, media stories.

[2] The list of documents outlined here expands on an initial compilation prepared by the JustGESI Work Package 2 Malawi Team. We gratefully acknowledge the contributions of Christabel Yollanda Kambala, Lindah Mwale, and Rossanie Daudi Malolo to this work.

	• **Informal documents**: Emails, fieldwork notes. • **External documents by third parties**: Materials produced by media, intergovernmental organisations, bilateral, regional, or international bodies that influence the operations of the selected institution or organisation. Once the relevant texts have been identified, they are analysed as follows: 1. **Categorisation of the Text -** Identify the type of document 2. **Generic Summary and Purpose -** Provide a brief overview of the text and explain why it was selected for analysis. 3. **Textual Analysis** The textual analysis broadly entails the following components: ○ **History/Genesis of the text:** When and why was it created? ○ **Implied or Expected Practices**: What practices or behaviours does the text promote or assume? ○ **Underlying Assumptions**: What assumptions shape these implied or expected practices? ○ **'Ranking' of Texts**: Assess the importance of each text in shaping institutional practices. This will help identify 'boss text' i.e. those that hold significant influence over other texts and practices.
3. Exploration of Lived Experiences and Work Knowledges	Textual analysis often unfolds alongside the exploration of people's lived experiences and practices as they navigate institutions, whether as workers or as service users. In JustGESI, two types of experiences and work knowledges are particularly relevant: • The experiences of employees, including experiences of discrimination and inclusion, and the work knowledges that shape the everyday organisational practices. • The experiences of those accessing the organisation's services, and the work knowledges they draw on in navigating systems as users, consumers, or beneficiaries, which illuminate dynamics of discrimination and inclusion. To explore lived experiences and work knowledges, the following data collection methods can be used: ○ Semi-structured/narrative interviews that capture personal experiences and work knowledges documenting day-to-day activities ○ Observations/ shadowing of everyday interactions at work, in meetings, or at public events ○ Researcher's reflections and fieldwork diary, including consideration of the researcher's own positionality ○ Focus group discussions
4. Identification and Documentation of Disjunctures	Based on exploration of lived experiences and relevant textual analysis, the next step is to identify a disjuncture. A disjuncture refers to a mismatch or gap, where people's lived experiences do not align with how those experiences are represented and organised by institutional processes or texts. In JustGESI, we identify, describe, and document disjuncture(s) using the following three-step analytical approach:

	○ **Step 1: Define** – Identify the contradiction, gap, or tension between what institutional texts or policies claim and the actual lived experiences of individuals within the organisation, or of those who are external beneficiaries or members of the organisation's target groups. ○ **Step 2: Explain** – Analyse the drivers, impacts, and consequences associated with the disjuncture(s). ○ **Step 3: Describe and Document** – Outline the different elements of each disjuncture, supported by evidence and illustrative examples. Identifying disjunctures is not always a linear process. In some cases, additional disjunctures become visible only when researchers begin analysing how institutional processes are text-organised and coordinated, as outlined in the next stage of the framework.
Mapping Text-Organised Coordination	This stage moves beyond identifying and documenting disjunctures to analysing and mapping how institutional processes are coordinated through texts. It involves three analytical strategies: ● **Revisiting and Testing Boss Texts** – This strategy involves returning to the key texts identified earlier in the research process to evaluate which texts hold practical influence, which operate primarily at the level of discourse, and which remain largely absent in practice despite their formal significance. ● **Constructing Text–Act–Text Sequences** – This strategy traces how texts are read, interpreted, and applied within specific work processes, and how these actions generate new texts. In doing so, it reveals chains of coordination within the institution. ● **Examining Intertextualities** – This strategy focuses on the relationships among multiple texts that collectively coordinate institutional life. It involves identifying sequences, interdependencies, or hierarchies of texts that underpin organisational processes.
Mapping Ruling Relations	This final stage moves beyond analysing textual coordination within specific sites and focuses instead on how those 'local' practices are organised by broader institutional systems that operate across organisational, sectoral, and geographic boundaries. The aim is to reveal the translocal ruling relations that shape people's everyday work. It involves three key strategies: ● **Tracing Text Circulation** – This involves following how texts travel across institutional sites and how they mediate coordination among multiple actors such as donors, ministries, utilities, frontline staff, and community members. Here, the concern shifts from how a text is used locally to how it functions within a wider system of governance and accountability. ● **Identifying Actors and Authorities** – This activity focuses on the institutional actors who activate, interpret, and enforce texts across different levels of the system. It highlights how authority, accountability, and decision making operate translocally and how they shape the conditions under which local work takes place.

	• **Documenting Institutional Pathways** – This involves mapping the broader institutional pathways through which everyday practices and experiences are coordinated. These pathways show how different actors, sites, texts, and activities become interconnected through ruling relations. Visual diagrams can support this process, but the primary goal is to produce an analytic account that explicates how these relations are organised and how they shape local experiences.

5. Conclusion

This handbook has demonstrated how Institutional Ethnography (IE) offers considerable methodological and analytical potential for advancing Gender Equality and Social Inclusion (GESI) in the energy sector. By beginning from people's everyday experiences and tracing the institutional processes that shape them, IE enables researchers to examine both the realisation of GESI commitments and the persistence of exclusion within energy systems. Through its focus on work practices, texts, and institutional coordination, IE helps reveal how inequalities are organised, reproduced, and sometimes challenged in practice.

This handbook has introduced the core principles of IE and presented the methodological framework developed within the JustGESI project. In doing so, it has shown how IE can be applied to the study of energy systems in ways that are rigorous, context-sensitive, and grounded in the lived realities of those who work within, interact with, and are affected by energy institutions.

To reiterate, central to IE is the commitment to beginning from the standpoint of real people, recognising them as knowledgeable actors whose everyday activities are coordinated through texts, institutional processes, and social relations. Rather than treating concepts such as power, discrimination, or exclusion as abstract forces, IE investigates how they become active in practice through organisational routines, policies, administrative processes, and everyday interactions. In this way, IE provides a distinctive lens for understanding how institutional relations shape experiences, opportunities, and often uneven outcomes.

At the same time, IE does not provide a fixed methodological template. Its flexibility allows researchers to adapt its principles to diverse contexts and research questions, while remaining attentive to the institutional processes under investigation. The JustGESI IE methodological framework presented in this handbook is therefore not intended as a universal model. Rather, it represents one adaptation of IE developed for a cross-country, comparative study of gender equality and social inclusion in energy transitions. We hope it serves as a useful reference point for researchers seeking to apply Institutional Ethnography in energy research and related fields.

Ultimately, achieving a just energy transition requires more than technological innovation, policy commitments, or increased representation alone. It further requires understanding how institutional practices, organisational cultures, and systems of coordination shape whose voices are heard, whose needs are recognised, and whose participation is enabled or constrained. By making these often-hidden processes visible, Institutional Ethnography offers a powerful approach for supporting gender-transformative and socially inclusive energy research and for identifying opportunities to advance more equitable energy futures.

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