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Investing in a Research Revolution for LGBTI Inclusion

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Executive Summary

Introduction: In 2015, 193 United Nations member countries adopted the Sustainable Development Goals (SDGs) and committed to “leaving no one behind” in the effort to end poverty and inequality. Lesbian, gay, bisexual, transgender, and intersex (LGBTI) people throughout the world have led global efforts to raise awareness of their experience of ongoing discrimination, exclusion, and violence. Despite some gains that have made information more available, huge gaps in research and data on LGBTI experiences persist in every country, blocking progress toward inclusion and the realization of human rights for all. Clearly, significant donor investment in strategic research on LGBTI inclusion is needed, in both the immediate and the long term, to provide a reliable evidence base that can inform policies, legislation, programs, and investments to advance the human rights and inclusion of LGBTI people in national and global efforts.

Identifying Research Priorities: This paper is not a specific proposal. Rather, its intention is to highlight for discussion the critical research and knowledge gaps with regard to human rights and inclusion for LGBTI people that require investments to ensure that they are part of the human rights and development agendas. In light of these significant gaps, the paper outlines a number of high-priority research needs that have been identified as a result of wide-ranging consultations with civil society organizations (CSOs), governments, research institutions, human rights and development agencies, and researchers.

Data and research defining and measuring the social inclusion and exclusion of LGBTI people are at the top of the list of priorities. Global consultations led by the United Nations Development Programme (UNDP) about a proposed LGBTI Inclusion Index revealed widespread agreement on five high-priority dimensions of inclusion in development (from a rights-based approach): health, economic well-being, personal security and violence, education, and political and civic participation. In each of these dimensions, new data and research will be required to create an index that will track the degree of LGBTI inclusion, both cross-nationally and within individual countries, which can then be used to inform laws, policies, programs, and budgets to advance this goal.

There are other related research priorities. For example, estimates of the size of the LGBTI population and accurate measures of public opinion would be invaluable in the effort to frame and evaluate the impact of investments in inclusion. Other priorities include examining the links between LGBTI inclusion and national economic development, tracking the impact of laws and practices that make LGBTI people more vulnerable, assessing the influence of prevailing gender norms, measuring the prevalence and impact of conversion therapies, and studying the impacts of mass movements of people on this community. Research on new data collection methods, as well as new survey questions about sexual orientation, gender identity, and sex characteristics (SOGIESC), would underpin the collection of all of this critical data.

Several themes cut across these priorities. As in all research, it will be important to take into account the multiple identities that people hold (such as race, ethnicity, religion, age, and so on). It will also be important to be able to disaggregate data to get measures for separate groups within the LGBTI umbrella term, particularly for transgender and intersex people, where there is a distinct dearth of research. Finally, research protocols and approaches will need to ensure that data collection efforts cause no harm and fully respect the rights of LGBTI people, including their privacy and dignity.

Strategic Investments: In light of the research gaps, a set of proposed strategic investments would focus on those high-priority topics. These investments would also build an LGBTI research infrastructure, defined as resources and networks of government, human rights, development, civil society, and other representatives and institutions that produce and share knowledge about LGBTI people and issues.

Recommendation 1. Invest in capacity building and partnerships between governments, LGBTI civil society groups, academics, multilateral institutions, and other stakeholders to create an infrastructure for LGBTI research and data collection. This recommendation includes resources for efforts to:

- Support strategic networks in countries and regions to develop instruments and methodologies for survey and administrative data collection and to lead educational efforts with governments
- Increase government commitment to LGBTI inclusion by funding government research and data capacity on LGBTI issues
- Fund and promote communication and collaboration between researchers and the LGBTI community
- Fund the expansion of a robust academic infrastructure to produce new researchers

Recommendation 2. Fund the establishment and operationalization of the UNDP LGBTI Inclusion Index (which will contribute to the national capacity building mentioned in Recommendation 1) to undertake the targeted research required for each of the identified priority dimensions of the LGBTI Inclusion Index: health, economic well-being, personal security and violence, education, and political and civic participation. This recommendation includes short-term (12 month), medium-term (12–48 month), and long-term (48–60 month) investments to: build a research infrastructure and partnerships between governments, CSOs, academics, multilaterals and other stakeholders; mine existing data for relevant data on LGBTI inclusion; collect new data on the key priority dimensions of LGBTI inclusion; design, maintain, build, and analyze a database for the LGBTI Inclusion Index; and produce reports to support advocacy and evidence-based law, policy, program, and budgetary decisions to advance the inclusion and human rights of LGBTI people.

Recommendation 3. Fund existing, new, or future research priorities identified by LGBTI civil society, whether related to local, national, regional, or global issues. Civil society has already identified and embarked on some essential projects that will need funding. Other important initiatives to fund would expand the knowledge base on under-researched groups, particularly

intersex people, transgender people, low-income LGBTI people, and LGBTI people in ethnic minority groups.

What success looks like: If sufficient strategic investments are made in LGBTI research and data collection, knowledge about LGBTI people will increase dramatically, which will empower LGBTI people and their governments to move toward the SDG promise of inclusion and human rights for all. There will be a broad, active, and sustainable research infrastructure at the national and global level that is supported by government funding of and participation in new data and research. This research will inform and generate new programs, policies, and investments for inclusion and respect for the rights of LGBTI people. What is more, LGBTI people will be actively collaborating in the research process, and they will have the research and data that they need to advocate for social, legal, and political change.

1. Introduction

In 2015, 193 United Nations member countries adopted the Sustainable Development Goals (SDGs), which are rooted in human rights principles with the aim of fighting poverty and inequality and promoting inclusive development, “leaving no one behind.” Lesbian, gay, bisexual, transgender, and intersex (LGBTI) people have worked within their countries and globally to raise awareness about their experiences of persistent discrimination and exclusion.¹ However, LGBTI people have had very little data or research about their lives to draw on to inform policies, legislation, programs, and investments to advance LGBTI inclusion and respect for their rights. Today, the need for such knowledge greatly outstrips the current supply, and countries in the Global South are particularly in need of knowledge to support human rights and human development efforts for LGBTI people. This paper proposes an investment in knowledge that will transform global action on LGBTI issues by jumpstarting a research revolution.

As the SDGs heighten the focus on measurable outcomes, data on LGBTI people must catch up.² It is time to expand beyond the historical attention to HIV, which has underpinned advocacy efforts and allowed many health-based financing mechanisms to focus research on populations particularly at risk for HIV, notably gay men, men who have sex with men (MSM), and (only recently) transgender women. An exclusive focus on HIV leaves out many other LGBTI people

¹ The terms used by individuals and groups to describe their sexual orientation, gender identity and expression, and sex characteristics (SOGIESC) vary across and within countries. In using LGBTI to identify the groups facing exclusion, it is acknowledged that these groups do not fully represent the range of identities found in the world. Nonetheless, this umbrella acronym is used because it captures vulnerability to similar kinds of exclusion that might be experienced by LGBTI people and by those with other identities related to SOGIESC. To avoid confusion, this acronym is used even in situations where some parts of that group might not have been represented, such as discussions of past research.

² For an analysis of how SOGIE issues fit into the SDGs, see Elizabeth Mills “‘Leave No One Behind’: Gender, Sexuality and the Sustainable Development Goals,” IDS Evidence Report 154 (Brighton, UK: Institute of Development Studies, 2015).

and the many other human rights and development challenges they face. Increasingly, bilateral and multilateral aid agencies, international foundations, and human rights organizations are prioritizing the well-being of LGBTI persons. More data and research would provide a better assessment of the lived experience of LGBTI people around the world, supporting advocacy and providing evidence on a range of fronts. Human rights organizations would have new ways to monitor the inclusion of LGBTI people and the fulfillment of government obligations and commitments in relation to international human rights standards. Governments, civil society organizations (CSOs), development agencies, and other partners need more data to understand the link between LGBTI exclusion and sustainable development and to create evidence-based laws, policies, programming, and budgeting. Moreover, LGBTI activists are seeking more data and research for advocacy to educate the world about their lives and the urgent need for change.³

Research has already been a powerful tool in LGBTI human rights and social change in some parts of the world. Nongovernmental organizations (NGOs) and researchers on LGBTI issues have worked with and successfully encouraged governments to collect data on same-sex couples and LGBTI people in many countries in North America, Europe, and Latin America. This information has helped to counter stereotypes and morality-based arguments by showing the very real harm of exclusion for LGBTI people and for society as a whole, as well as the benefits of inclusion and respect for the rights all. Recent research has allowed civil society actors to craft new arguments and policy makers to make more informed decisions about decriminalization, nondiscrimination laws, health care, educational access, and family recognition, along with many other issues. This new information has also led to other important developments, including:

- Research showing that LGBTI parents raise healthy children has supported successful litigation on child custody issues (Inter-American Court of Human Rights) and marriage equality (Colombia, United States).
- A study demonstrating the economic cost of the exclusion of LGBTI people in India helped activists make new arguments to persuade policy makers of the value of inclusion.
- Studies of the prevalence of HIV in Kenya have demonstrated the importance of focusing health care and prevention efforts on gay and bisexual men and transgender women.
- Data on prejudice toward LGBTI people in the Caribbean documented the need for greater protection of human rights.

These examples provide a glimpse of the change that might be possible on a global scale with a greater investment in data and research to inform laws, policies, programs, and budgeting. Yet in spite of its demonstrated utility, only a tiny share—5 percent—of the limited global funding

³ This particular point was emphasized in a consultation between the authors, LGBTI organizations, and institutional partners at the Global LGBTI Human Rights Conference held in Uruguay in July 2016. See the Annex for more information.

for LGBTI issues currently goes to support research,⁴ a level that is simply not adequate to meet the growing knowledge needs and make use of the new opportunities, including in relation to the SDGs.

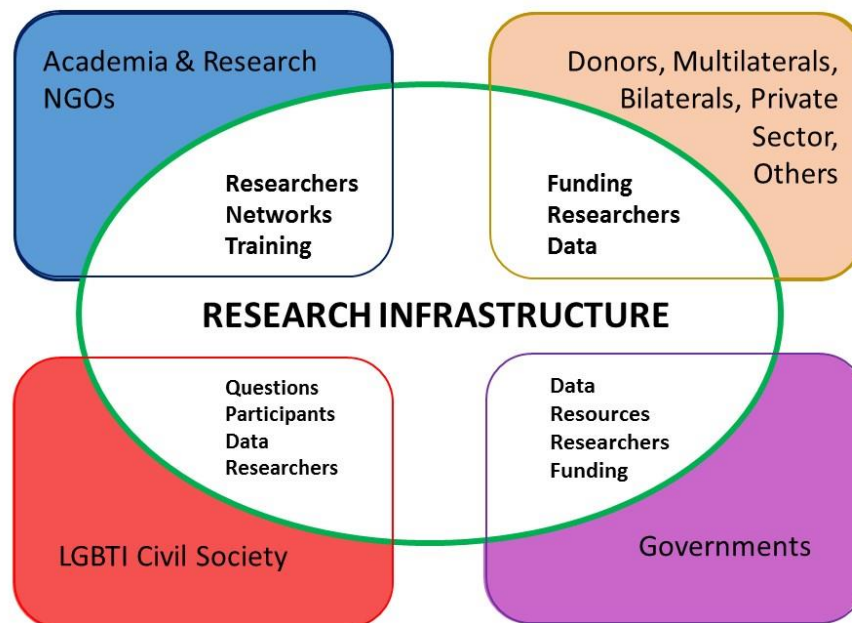
Many new research investments could take advantage of “low-hanging fruit” and produce immediate benefits. National and global data are currently available that are both unused and underused. Providing support to researchers and policy makers to analyze the LGBTI implications of that data in new research projects might, in some countries at least, meet some of the knowledge needs described below in Section 2.

Other important goals will take longer to achieve, particularly the development of a global research infrastructure. In the context of LGBTI issues, the research infrastructure would be made up of national and global stakeholders and would include networks of researchers, LGBTI-related NGOs, government departments and ministries, parliaments, human rights and development institutions (national, bilateral, and multilateral), other funders, and universities that produce and share knowledge about LGBTI people and issues (see figure 1).⁵ The significant scaling up of research will require investments in many parts of the proposed infrastructure. For example, getting governments committed to and capable of collecting data on LGBTI people will require advocacy, sustained capacity building, and research strategies to create, test, and adapt methods for the most appropriate and reliable ways of asking questions on surveys about sexual orientation, gender identity and expression, and sex characteristics (SOGIESC) in a range of contexts. Training researchers to analyze the data and create a new knowledge base and working with LGBTI civil society groups and actors and national policy makers to identify local and national research priorities will both take significant time and resources. Nevertheless, together and over time, these efforts will create a sustainable global capacity to provide the data and knowledge needed to accelerate, monitor, and evaluate the progress of LGBTI people in the human rights and development context.

⁴ Funders for LGBTQ Issues, “A Global Gaze: Lesbian, Gay, Bisexual, Transgender and Intersex Grantmaking in the Global South and East 2010” (New York: Funders for LGBTQ Issues, 2011), https://www.lgbtfunders.org/files/A_Global_Gaze_2010.pdf; and Global Philanthropy Project and Funders for LGBTQ Issues, “2013/2014 Global Resources Report. Government and Philanthropic Support for Lesbian, Gay, Bisexual, Transgender, and Intersex Communities” (New York: Global Philanthropy Project and Funders for LGBTQ Issues, 2016).

⁵ This definition draws on P. Edwards and others, “Knowledge Infrastructures: Intellectual Frameworks and Research Challenges” (Ann Arbor, MI: Deep Blue, 2013), <https://deepblue.lib.umich.edu/handle/2027.42/97552>.

Figure 1: The LGBTI Research Infrastructure



The next section outlines the research priorities that have emerged as a result of extensive consultations with the LGBTI community. Section 3 presents recommendations for funding specific projects and high-priority research needs, such as the proposed LGBTI Inclusion Index of the United Nations Development Programme (UNDP), and for building the underlying infrastructure that would create the needed research capacity. Section 4 concludes with a summary and long-term vision of what a successful global research community on LGBTI issues would look like. A discussion of methods informing this paper, including greater detail about the consultations, is in the Annex.

The strategic investments outlined in this paper would ensure attention to LGBTI people in the SDGs and create an evidence base for policies and programs that would more rapidly advance the goals of LGBTI inclusion and human rights globally. To this end, all of the priorities and recommendations discussed in the next two sections share these common principles:

- the importance of LGBTI community leadership and participation
- the responsibility of governments to develop knowledge and data about LGBTI people and their inclusion and rights, including to inform laws, policies, programs, and budgetary priorities to advance these objectives
- the use of ethical, safe, and respectful methodologies that are most appropriate for and effective in different contexts
- the importance of research partnerships between governments, civil society, academia, and multilaterals institutions

- the crucial contributions of a vibrant academic community
- the understanding that research should be relevant and useful to improving the lives of LGBTI people

Building a research infrastructure will be a global public good, increasing research capacity and knowledge for all governments, interested agencies, civil society, and other stakeholders at the global, regional, and national levels. And as a shared public good, the plan outlined here provides opportunities for partnership and points to the need for collaboration across organizations in order to meet the knowledge needs for LGBTI human rights and development issues.

2. Research Priorities

It is clear that large data and knowledge gaps about LGBTI people persist. These gaps are reflected in an examination of current literature reviews and reports primarily written by CSOs, research institutions, human rights organizations, and government and development agencies and informed by formal and informal consultations. This section prioritizes the topics relevant to LGBTI inclusion that have been identified as most important by CSOs and others and presents clear **research priorities** for donors, program countries, development partners, and the private sector to consider in the effort to promote a research revolution and create a sustainable LGBTI research infrastructure.

Four cross-cutting themes emerge consistently in literature and research and should be considered in connection with each research priority:

- *Participant safety and ethical concerns.* There is a potential risk that research may inadvertently subject LGBTI participants to violence or discrimination. To mitigate risks and promote safety, researchers should follow professional ethical guidelines and additionally should respect the wishes, rights, and dignity of the community; ensure confidentiality at all times; promote participant safety and security; prevent re-traumatization; and ensure that teams in the field are fully trained in best practices of data collection, including informed consent, and sensitized to the specific vulnerabilities of LGBTI people.⁶ Also, research findings should be presented with an understanding of how they might be interpreted in negative ways.⁷

⁶ This refers to ethical standards culled from standards in interventions developed by the World Bank, Inter-American Development Bank, International Center for Research on Women, and Global Women's Institute and articulated in "Violence Against Women & Girls Resource Guide" (Washington, DC: World Bank, Inter-American Development Bank, Global Women's Institute, and International Center for Research on Women, 2014), <http://www.vawgresourceguide.org/ethics>.

⁷ This point was emphasized in the discussions at the Global LGBTI Human Rights Conference in Uruguay (see Annex).

- *Intersectionality.* Different identity and social categories—including sexual orientation, gender identity, intersex status, gender, age, employment, religion, ethnicity, race, socioeconomic status, and so forth—often intersect in a way to shape one’s experiences and societal expectations. For many LGBTI people, this intersection creates specific vulnerabilities to discrimination and violence.⁸
- *Disaggregating data.* Noting the diversity of “letters” within the LGBTI acronym, disaggregation into specific groups may fill in missing research and data gaps and highlight the experiences of specific groups of LGBTI people that have traditionally been ignored. Specifically, lesbian and bisexual women, transgender men and women, persons with non-binary identities, and intersex individuals are underrepresented in the bulk of existing research studies and data collection.⁹
- *Alternative experiences and identities.* The concepts in the LGBTI acronym may not always pertain to the diversity of experiences and identities that sexual and gender nonconforming individuals live with or adopt, for example, third gender *hijras or kothis* in South Asia.¹⁰ Alternative or local identities outside of the LGBTI acronym have substantial implications for data collection and measurements. In generating meaningful analysis and knowledge to guide policy, categories of identity can be developed through a participatory approach, with options to self-identify during data collection.¹¹

Social inclusion priority dimensions

Promoting the social inclusion of marginalized groups occurs through a series of actions and programs toward a targeted end. In this sense, social inclusion is both a *process* as well as an *outcome*.¹² As such, inclusion offers salient entry points for analytical work on measuring the extent of LGBTI exclusion as well as establishing the indicators of a fully inclusive society.

⁸ CREA, “Count Me In! Research Report Violence against Disabled, Lesbian, and Sex-Working Women in Bangladesh, India, and Nepal” (New Delhi: CREA, 2012), <http://www.creaworld.org/sites/default/files/The%20Count%20Me%20In!%20Research%20Report.pdf>; and P. Crehan and J. McCleary-Sills, “Brief on Violence against Sexual and Gender Minority Women” (Washington, DC: World Bank Group, Inter-American Development Bank, Global Women’s Institute, and International Center for Research on Women, 2015), http://www.vawresourceguide.org/sites/default/files/briefs/vawg_resource_guide_sexual_and_gender_minority_women_final.pdf.

⁹ K. Hawkins and others, “Sexuality and Poverty Synthesis Report,” IDS Evidence Report 53 (Brighton, UK: Institute of Development Studies, 2014), <http://opendocs.ids.ac.uk/opendocs/bitstream/handle/123456789/3525/ER53.pdf?sequence=1>.

¹⁰ This theme was also emphasized at the Uruguay conference.

¹¹ OHCHR, “A Human Rights-Based Approach to Data. Leaving No One Behind in the 2030 Development Agenda” (Geneva: Office of the High Commissioner for Human Rights, 2016), <http://www.ohchr.org/Documents/Issues/HRIndicators/GuidanceNoteonApproachtoData.pdf>.

¹² World Bank, *Inclusion Matters: The Foundation for Shared Prosperity* (Advance Edition) (Washington, DC: World Bank, 2013), http://siteresources.worldbank.org/EXTSOCIALDEVELOPMENT/Resources/244362-1265299949041/6766328-1329943729735/8460924-1381272444276/InclusionMatters_AdvanceEdition.pdf.

Through a series of expert and community consultations that included representatives of civil society, academia, the private sector, and multilaterals, UNDP developed a process definition of LGBTI inclusion that is pertinent to the diversity of experiences that these communities face. Inclusion is defined as “...access to opportunities and achievements of outcomes for LGBTI people....,”¹³ a process definition that should guide the collection of data in relation to the opportunities and outcomes in key sectors. The consultation process culminated in an agreement that an LGBTI Inclusion Index would provide a valuable measure of inclusion that could be compared globally for use in the context of the SDGs and other data needs.¹⁴

During the consultation process, the following five sectors were identified as priority dimensions for the proposed index, categories that could also play a useful role in a broader research agenda on LGBTI inclusion. These dimensions will require that measures be developed that are comparable across countries in order to go into the index.¹⁵ (See the recommendations and figure 2 in section 3).

Health. Globally, data on the health equity and outcomes of LGBTI persons are sparse. However, some health institutions are building an evidence base and have already found an alarming global pattern: LGBTI persons experience poorer health outcomes than the general population and have specific vulnerabilities that are fueled by exclusion, social stigma, and discriminatory laws, policies, and practices.¹⁶ The stigma and pathologization of people with non-normative SOGIESC have even fueled targeted violence against LGBTI people, including forced sterilizations, forced abortions, and/or forced anal examinations.¹⁷ However, this evidence base needs to be bolstered with a specific focus on health issues beyond HIV, reproductive health, access to services, bias among health care providers, and other LGBTI health outcomes. In particular, research on the mental health of LGBTI people is largely absent in many countries, although data in some countries show that LGBTI people experience depression and anxiety at a higher rate in comparison to the general population, which can

¹³ UNDP, “Concept Note, Global LGBTI Index” (New York: UNDP, 2016).

¹⁴ A global index is just one of many culminations of research when regarding the dimensions listed above. However, due to the unprecedented support of LGBTI organizations for these dimensions as part of the UNDP LGBTI Global Index, this section showcases them as significant priorities.

¹⁵ Although health, economic well-being, personal security and violence, education, and political/civic participation have been identified as the key dimensions for the LGBTI Inclusion Index, some of the following are areas in which LGBTI people also experience exclusion: youth empowerment, access to information, access to justice, access to housing and other goods and services, and food security, among others.

¹⁶ WHO, “Improving the Health and Well-Being of Lesbian, Gay, Bisexual and Transgender Persons” (Geneva: World Health Organization, 2013), http://www.ghwatch.org/sites/www.ghwatch.org/files/B133-6_LGBT.pdf.

¹⁷ WHO, *Sexual Health, Human Rights and the Law* (Geneva: World Health Organization, 2015), http://apps.who.int/iris/bitstream/10665/175556/1/9789241564984_eng.pdf.

often lead to suicide.¹⁸ Data on the extent of mental health disparities should therefore also be scaled up.¹⁹

Economic well-being. Due to a lack of data and research on the relationships between SOGIESC and poverty,²⁰ there now exists only a limited empirical link between discrimination, violence, and a lower socioeconomic status among LGBTI individuals.²¹ What little research exists shows that LGBTI people are highly vulnerable to poverty,²² most likely because they are cut off from the opportunities or resources needed to build one's human and social capital, capabilities, and/or productive assets. Although a preliminary link has emerged to show a cycle of poverty for some LGBTI people, more data and analysis are needed.²³

Personal security and violence. In many countries, LGBTI persons cannot safely report an act of violence or access justice following an attack, and thus the extent of SOGIESC-motivated violence is largely unknown. Although existing statistics show alarming rates of violence against LGBTI people²⁴—and in particular against transgender women²⁵—these figures are believed to be significantly underrepresenting the problem, including because of the reluctance of LGBTI people to report violence to the authorities.

Education. Access to education for LGBTI persons is critical in its own right and also has direct impacts on other dimensions, including but not limited to economic empowerment. Not only do LGBTI people need to have access to education, education systems also need to meet their needs. This includes having policies on equality and diversity in education as well as measures

¹⁸ J. Grant, L. Mottet, and J. Tanis, "Injustice at Every Turn, A Report of the National Transgender Discrimination Survey" (Washington, DC: National Gay and Lesbian Task Force and the National Center for Transgender Equality, 2011), http://www.thetaskforce.org/static_html/downloads/reports/reports/ntds_full.pdf; T. Ojanen, R. Ratanashevorn, and S. Boonkerd, "Gaps in Responses to LGBT Issues in Thailand: Mental Health Research, Services, and Policies," *Psychology of Sexualities Review* 7, no. 1 (2016); and S. L. Budge, J. L. Adelson, and K. A. Howard, "Anxiety and Depression in Transgender Individuals: the Roles of Transition Status, Loss, Social Support, and Coping," *Journal of Consulting and Clinical Psychology* 81, no. 3 (2013).

¹⁹ UNDP and USAID, "Being LGBT in Asia: Nepal Country Report/Thailand Country Report. A Participatory Review and Analysis of the Legal and Social Environment for Lesbian, Gay, Bisexual and Transgender (LGBT) Persons and Civil Society" (Bangkok: UNDP and USAID, 2014), <http://www.asia-pacific.undp.org/content/rbap/en/home/operations/projects/overview/being-lgbt-in-asia.html>.

²⁰ Hawkins and others, "Sexuality and Poverty Synthesis Report."

²¹ S. Jolly, "Poverty and Sexuality: What Are the Connections?" (Stockholm: Swedish International Development Cooperation Agency, 2010), <http://www.globalequality.org/storage/documents/pdf/sida%20study%20of%20poverty%20and%20sexuality.pdf>.

²² M. V. Lee Badgett, "The Economic Cost of Stigma and the Exclusion of LGBT People: a Case Study of India" (Washington, DC: World Bank, 2014), <http://documents.worldbank.org/curated/en/2014/10/23952131/economic-cost-stigma-exclusion-lgbt-people-case-study-india>.

²³ S. Singh and others, "Experienced Discrimination and its Relationship with Life Chances and Socio-Economic Status of Sexual Minorities in India," Amaltas Research (Washington, DC: World Bank, forthcoming).

²⁴ IACHR, "An Overview of Violence Against LGBTI Persons in the Americas. A Registry Documenting Acts of Violence Between January 1, 2013 and March 31, 2014" (Washington, DC: Inter-American Commission on Human Rights, Organization of American States, 2014), http://www.oas.org/en/iachr/media_center/PReleases/2014/153A.asp.

²⁵ See the website, Trans Respect vs. Transphobia at <http://transrespect.org/en>.

to combat stigma, discrimination, and bullying. Globally, SOGIESC-motivated violence and bullying in schools can be very common and can be committed by peers as well as school staff, including teachers. This bullying often leads LGBTI students to drop out or experience significant mental health problems, which are harmful outcomes for both the individual as well as the larger community and society. However, concrete research on the prevalence and extent of SOGIESC-motivated bullying, as well as its corresponding impact on individuals and society, is sparse in many contexts, particularly in college and university settings.²⁶ When teachers, counselors, and other staff promote a culture of inclusion (perhaps by positive representation of LGBTI students in school curricula²⁷), students are able to develop the essential skills necessary for a fulfilled life and thus add to productive societies.²⁸ Research can also show the effect of such inclusion programs on the prevalence of violence against LGBTI students and offer insights on how to combat it at a school-wide and government level.

Political and civic participation. Although participation by LGBTI people in political bodies, state-building exercises, and intra-state conflict resolution has been observed, a systematic examination of the opportunities for LGBTI people to engage in civic and political processes is largely lacking. Indicators of participation would include being involved in decision making on legal frameworks, policies, and practices that relate directly to discrimination and also on legislation that shapes the degree to which LGBTI people are fully included in civic and political life, such as laws regarding legal recognition of identity and criminalization, the registration of NGOs, and funding restraints. In addition, analyses of elected officials, political parties, and LGBTI organizations and publications would further illuminate the degree of inclusion. This research could also directly identify the needs for capacity building within the LGBTI civil society community and effective strategies for political mobilization and change.

Other high-priority needs as identified by LGBTI civil society and institutions

Outside of social inclusion and the five sectors outlined above, many other important research priorities were articulated by CSOs, researchers, human rights institutions, government agencies, and development institutions.

Population estimates of LGBTI persons. Public discussions and research about LGBTI issues often start with estimates of the size of the LGBTI population. One estimate of the proportion of the U.S. population who identifies as LGBT (not including intersex individuals) is 3.8 percent, with

²⁶ UNESCO, *Out in the Open, Education Sector Responses to Violence Based on Sexual Orientation and Gender Identity/Expression* (Paris: UNESCO, 2015), <http://unesdoc.unesco.org/images/0024/002447/244756e.pdf>.

²⁷ Ibid.

²⁸ C. Vagneron and F. Houdart, "Homophobic Bullying in Educational Institutions Undermines World Bank Equity Efforts," World Bank, Education for Global Development (blog), December 9, 2013, <http://blogs.worldbank.org/education/homophobic-bullying-educational-institutions-undermines-world-bank-equity-efforts>; and UNESCO, *Out in the Open*.

higher estimates when asking about same-sex behaviors and attractions.²⁹ A more recent estimate in the United States shows that approximately 0.6 percent of all adults (1.4 million people) identify as transgender.³⁰ Although methodological challenges exist in deriving these estimates,³¹ population estimates are useful for analyzing programs and demonstrating a need for more inclusive policies.

Measures of stigma in the general population and among public officials. Public opinion and attitudes about LGBTI people and issues matter and are sometimes mentioned separately as a research priority. These attitudes can act as barometers of potential violence or discrimination.³² In this sense, research that measures attitudes toward LGBTI people may capture an important dimension of their ability (or inability) to access markets, services, or spaces. For example, measurements of antipathy among service providers can offer meaningful insights on why LGBTI people may experience barriers in accessing essential services.³³ Public opinion data may also better inform LGBTI campaigns and identify weak points within a group's strategy.³⁴ Attempts to measure attitudes in the general population should add more in-depth questions on gender identity and intersex status—two largely ignored components.

Relationship between rights, inclusion, and economic growth. Research can also uncover how micro-level forms of exclusion may aggregate to impact the human and economic development of the larger society.³⁵ Specifically, research can show a relationship between human rights, inclusion, and economic growth. For example, in an analysis of 39 countries, an additional right for LGBT (not including intersex) persons in a country is associated with US\$300 more in GDP per capita and a higher value in the Human Development Index.³⁶ This research could be expanded upon to include a broader set of countries and economic outcomes to serve two purposes: first, in reaching out to more low- and high-income countries, an analysis might

²⁹ G. Gates, "How Many People are Lesbian, Gay, Bisexual, and Transgender?" (Los Angeles, CA: The Williams Institute, UCLA, 2011), <http://williamsinstitute.law.ucla.edu/wp-content/uploads/Gates-How-Many-People-LGBT-Apr-2011.pdf>.

³⁰ A. Flores and others, "How Many Adults Identify as Transgender in the United States?" (Los Angeles, CA: The Williams Institute, UCLA, 2016), <http://williamsinstitute.law.ucla.edu/wp-content/uploads/How-Many-Adults-Identify-as-Transgender-in-the-United-States.pdf>.

³¹ These methodological challenges may be quite significant. Deriving accurate estimates may be challenging if people are afraid to identify, perhaps due to stigma or insufficient trust between researchers and participants. In turn, low-end estimates may stymie appropriate policies for LGBTI people and groups. These points were brought out during the authors' discussions with LGBTI organizations and others at the 2016 Uruguay conference.

³² World Bank, *Inclusion Matters*.

³³ FRA, *Professionally Speaking: Challenges to Achieving Equality for LGBT People* (Vienna: European Union Agency for Fundamental Rights, 2015), http://fra.europa.eu/sites/default/files/fra_uploads/fra-2016-lgbt-public-officials_en.pdf.

³⁴ This point was emphasized during the consultations at the Uruguay conference.

³⁵ At the Uruguay conference, participants expressed an interest in scaling up and replicating this line of research ("the cost of homo/transphobia"). See the Annex for more information on these discussions.

³⁶ M. V. Badgett and others, "The Relationship between LGBT Inclusion and Economic Development: An Analysis of Emerging Economies" (Washington, DC and Los Angeles: USAID and The Williams Institute, 2014), <https://www.usaid.gov/sites/default/files/documents/15396/lgbt-inclusion-and-development-november-2014.pdf>.

provide a better understanding of the relationship between rights and economic development; second, this analysis might uncover more specifically how rights have an impact on the economy, for example, through foreign direct investment or tourism.³⁷

Impact of laws, policies, and programs. Although laws alone will not end stigma, they often mitigate the terms by which LGBTI people may or may not engage in society. Outside of the HIV arena, few studies exist to show the link between laws and an LGBTI person's experience of discrimination and violence—or even inclusion. Although anecdotal and qualitative data suggest direct impacts (particularly from the harshest and most punitive laws), quantitative and representative studies on specific impacts are rare. Research can also study the impact of positive laws designed to respect human rights and promote the participation and inclusion of LGBTI people in many sectors. In particular, research may uncover whether some laws, policies and programs actually promote inclusion, the development of human capital, and/or higher economic productivity, for example.

A related research gap concerns the impact of other policies and programs on LGBTI people. Programs specific to LGBTI people and implemented by human rights or development agencies should be coupled with monitoring and evaluation (M&E) from an early stage. More general programs and policies in social, economic, justice, and other sectors should seek to monitor and evaluate the impacts on LGBTI people, including the lack of access or any other negative impact. This kind of research would provide an evidence base to inform future programming, filling the current immense M&E data gaps. Assessments can uncover the barriers LGBTI persons may face in accessing development programming, perhaps because heteronormative language or traditional notions of gender have been written into the programs. Poverty and Social Impact Analyses (PSIAs) or Policy Audits can assess anti-poverty interventions and public efforts to reduce exclusion, analyzing whether or not LGBTI people are benefiting from such programs.³⁸ These analyses should also provide useful findings about the extent to which LGBTI inclusion/access helps bolster outcomes and development goals.³⁹

Link to prevailing gender norms. Growing quantitative evidence shows that the more patriarchal and male-dominated a society, the more intolerant it will be toward LGBTI people.⁴⁰ When hegemonic masculinity⁴¹ thrives, LGBTI people face specific vulnerabilities driven by strict

³⁷ Ibid.

³⁸ Hawkins and others, "Sexuality and Poverty Synthesis Report."

³⁹ Consultations at the Uruguay conference indicated that, in addition to human rights-based arguments, organizations are showing an increasing interest in research that highlights the link between policies and programs to actual improved outcomes, in order to appeal to decision makers who may be less convinced by the more traditional human rights approach.

⁴⁰ M. Greene, O. Robles, and P. Pawlak, "Masculinities, Social Change, and Development," Background Paper for *World Development Report 2012: Gender Equality and Development* (Washington, DC: World Bank, 2011); G. Barker and others, "Evolving Men: Initial Results from the International Men and Gender Equality Survey (IMAGES)" (Washington, DC and Rio de Janeiro: International Center for Research on Women (ICRW) and Instituto Promundo, 2011); and World Values Surveys (database), World Values Survey Association, <http://www.worldvaluessurvey.org/wvs.jsp>.

⁴¹ This refers to the dominant social position of heterosexual men.

gender norms as well as stigma against nonconforming sexual or gender identities. However, the bulk of analytical work conducted by development and aid institutions continues to posit a traditional binary notion of gender, in addition to the assumption of heterosexuality,⁴² thus excluding the experiences of many LGBTI people. Stepping outside of a gender binary and broadening the examination of power imbalances on the basis of gender as well as gender identity, sexual orientation, and intersex status can expand the reach of research on the root causes and sustained drivers of prevailing gender norms, violence, and discrimination.

The impact and prevalence of conversion therapies. Conversion therapies (or so-called “reparative” therapies) are a particularly virulent practice, rooted in stigma and having deleterious impacts on an LGBTI person’s health and well-being. They have no basis in modern science and are condemned by the World Health Organization (WHO).⁴³ This topic could include any sexually motivated act of violence with the added intention to—falsely—“cure” or “correct” women within the LGBTI community.⁴⁴ It could also include nonconsensual cosmetic surgeries performed on intersex children for the purpose of “correcting” their healthy bodies based on norms about gender or sexuality. Although conversion therapies continue to exist in a number of countries, there is little research in middle- and lower-income countries to indicate their prevalence or overall impact on mental and physical health.

Impact of migration or forced movement. Sometimes LGBTI people have little choice but to leave their homes, moving from rural to more accepting urban areas or from an intolerant to a more tolerant country,⁴⁵ or even as a result of a humanitarian crisis that displaces large segments of a population. Research can better uncover the reasons why LGBTI people leave a particular country, that is, the “push” factors that may be fueled by violence and stigma. In understanding the impact on the country of origin, research can also better estimate the number of LGBTI people who are forced to leave and identify how that loss of human capital and productivity depletes larger societal goals (in other words, the possible effects of a “brain drain”). Alternatively, research may also uncover “pull” factors from more tolerant countries and how the movement of LGBTI people may bring in human capital and boost the productivity of a host country.

LGBTI refugees are also significantly under-researched, although preliminary evidence shows that without the systems of resilience they cultivated in their home countries, they become more vulnerable to violence.⁴⁶ Thus, organizations and governments (in developed and

⁴² Crehan and McCleary-Sills, “Brief on Violence against Sexual and Gender Minority Women.”

⁴³ WHO, “Improving the Health and Well-Being of Lesbian, Gay, Bisexual and Transgender Persons.”

⁴⁴ IGLHRC, “Violence on the Basis of Sexual Orientation, Gender Identity, and Gender Expression Against Non-Heteronormative Women in Asia” (New York: Outright Action International, 2010), http://www.iglhrc.org/sites/default/files/386-1_0.pdf.

⁴⁵ F. Houdart and J. Fagan, “Pink Migration—Rising Tide of LGBT Migrants?” World Bank, People Move (blog), July 28, 2014, <http://blogs.worldbank.org/peoplemove/pink-migration-rising-tide-lgbt-migrants>.

⁴⁶ R. Greenwood and A. Randall, “Treading Softly: Responding to LGBTI Syrian Refugees in Jordan,” IMES Capstone Paper Series (Washington, DC: The George Washington University, Elliott School for International Affairs, 2015); and UNHCR, “Age, Gender and Diversity Policy: Working with People and Communities for Equality and Protection” (Geneva: United Nations High Commissioner on Refugees, 2011).

developing nations alike) involved in the resettlement process are left without crucial knowledge of the situation for some of the most vulnerable individuals and how to mitigate the serious risks to their physical integrity and well-being.⁴⁷

Emerging methodological opportunities to expand knowledge

In addition to knowledge gaps, there are also underused methods of conducting research that could expand the breadth and depth of data on LGBTI inclusion and exclusion. Filling this “methods gap” is critical to ensuring that the most appropriate and efficient ways to study LGBTI issues are utilized. There are several approaches that could also be used to address the research priorities outlined above. New research methods should also be considered within larger normative guidelines to respect the wishes, rights, and dignity of the LGBTI community.⁴⁸

National-level surveys and representative individual/household surveys. Most authoritative data for national policy making and programming come from government-sponsored surveys of representative samples of a country’s population, such as censuses and demographic surveys, crime victimization surveys, and poverty and welfare surveys. These surveys are considered representative because they are large, random (or “probability-based”) samples of the population.

Many of the research gaps outlined here will require such data to draw conclusions about the LGBTI population as a whole. This includes, for example, whether poverty and crime victimization rates are higher for LGBTI people than for the general population. But the data required to ask and answer those questions do not exist in most countries. As discussed in the next section, donors and development agencies can support the capacity of developing and middle-income countries to ask SOGIESC questions on large-scale surveys, add questions particular to the LGBTI experience, and disaggregate published outcomes by SOGIESC, thereby helping to close knowledge gaps. The collection of these kinds of data sets will require research on the definition of SOGIESC and the design of effective survey questions that will stand up to scientific scrutiny. For example, two U.S.-based initiatives took on this task for sexual orientation and gender identity questions in the past decade, as did survey researchers in the United Kingdom’s Office of National Statistics.

Macroeconomic modeling. Studies assessing the relationship between country-level macroeconomic measures, such as GDP or foreign direct investment, and LGBTI inclusion could provide powerful insights for policy discussions and bring new allies to the table. For example, the World Bank’s study of the exclusion of LGBT people in India illustrated that the cost of

⁴⁷ Among LGBTI refugees, some may be more vulnerable to violence or differential treatment. For a look at the many levels of vulnerability that refugees face (not necessarily motivated by SOGIESC), see the World Bank, “Forcibly Displaced: Toward a Development Approach Supporting Refugees, the Internally Displaced, and their Hosts,” Advance Edition (Washington, DC: World Bank, 2016), <https://openknowledge.worldbank.org/bitstream/handle/10986/25016/9781464809385.pdf?sequence=2>.

⁴⁸ This point was emphasized in consultations with LGBTI organizations and institutional partners at the Uruguay conference.

discrimination against these persons in employment and health services may be between US\$1.9 and US\$30.8 billion.⁴⁹

Mixed-methods research. Although quantitative research can uncover the scope of a problem, be used in rights-based advocacy at the UN level, and inform development programs, qualitative research can often fill in missing dimensions, specifically articulating the needs of subgroups and explaining quantitative data more clearly. A mixed-methods approach to data collection may better inform programs and policy on the national (and perhaps state or municipality) level, for example, by including questions and observations about implementation and enforcement.⁵⁰ Further, mixed-methods research may also provide a better basis for creating the benchmarks needed to track progress⁵¹ across time.

Using other innovative methods. Some new or rarely used methods address some of the methodological challenges of surveying representative probability samples (such as cost) and also provide meaningful information. For example, one study found that children who have non-normative sexual orientations were more vulnerable to physical as well as sexual abuse in the home compared to a control group of their heterosexual siblings.⁵² Other studies can unpack discrimination in formal sector employment. For example, in an experimental (or audit) study on resumes, researchers submitted several pair of almost identical resumes to 1,700 open positions, with the sole difference that one contained a marker that the applicant was LGBTI. The research demonstrated that the resume showing the LGBTI marker had a 40 percent lower chance of receiving an interview.⁵³

Big data and data science. Big data and data analysis seek to find meaningful patterns in massive data sets that are based on online behavior rather than surveys. Big data may offer insights into population estimates, geographic dispersion, and experiences of stigma. Moreover, supporting the analysis of big data may provide new routes to circumvent barriers in traditional survey research methods.⁵⁴ For example, faster computers have given researchers the ability to quickly mine very large data sets and find meaningful correlations that might

⁴⁹ A. Patel, "Homophobia May Cost India's Economy Billions of Dollars," *The Wall Street Journal*, India, June 10, 2014, <http://blogs.wsj.com/indiarealtime/2014/06/10/how-homophobia-hurts-indias-economy>.

⁵⁰ UNDP and USAID, "Being LGBT in Asia."

⁵¹ J. Klugman and others, *Voice and Agency: Empowering Women and Girls for Shared Prosperity* (Washington, DC: World Bank Group, 2014), <https://openknowledge.worldbank.org/handle/10986/19036>.

⁵² K. Balsam, E. Rothblum, and T. Beauchaine, "Victimization over the Life Span: A Comparison of Lesbian, Gay, Bisexual, and Heterosexual Siblings," *Journal of Consulting and Clinical Psychology* 73, no. 3 (2005): 477–87, <http://tpb.psy.ohio-state.edu/papers/Balsam%20JCCP%202005.pdf>.

⁵³ A. Tilcsik, "Pride and Prejudice: Employment Discrimination against Openly Gay Men in the United States," *American Journal of Sociology* 117, no. 2 (2011): 586–626, http://www.jstor.org/stable/10.1086/661653?seq=1#page_scan_tab_contents.

⁵⁴ User-generated online data may carry some biases as well. Global trends show that the Internet, in many contexts, tends to be less accessible to poor individuals and more accessible to those living in cities as well as to men and younger people. See World Bank, *World Development Report 2016: Digital Dividends* (Washington, DC: World Bank, 2016), <http://www.worldbank.org/en/publication/wdr2016>.

otherwise be invisible. As such, the potential of big data for LGBTI issues may be extraordinary, although few partnerships seem to currently exist between data scientists and LGBTI advocates.

Big data is also a space in which the private sector is heavily engaged and thus has an important role to play in related partnerships. Social media platforms and mobile apps, for example, already have millions of users with significant user-generated input. Partnerships that promote sharing and analyzing those data can yield a rich analysis that might otherwise be underestimated, such as better estimates of HIV-positive individuals or educational outcomes, to cite just two examples. This analysis can be used in targeted campaigns to fulfill the SDGs, such as Goal 3 (healthy lives) or Goal 4 (inclusive education).

Box 1: Summary of High-Priority LGBTI Research Needs

Measures of inclusion

- Health, including: health disparities involving inequalities in health access and health outcomes; pathologization of homosexuality and transgender people; lack of respect for bodily integrity of intersex people
- Economic well-being, including: income disparities and poverty levels of LGBTI people; the existence of employment and nondiscrimination laws and their implementation
- Personal security and violence, including: rates of violence against LGBTI people including homicides; police competency and training
- Education, including: access of LGBTI people to education and whether education systems meet their needs
- Political and civic participation, including: right to determine and get official recognition of identity; decriminalization of LGBTI people; number of “out” LGBTI parliamentarians and decision makers; ability of LGBTI people and organizations to exercise freedom of association, assembly, and expression

Additional high-priority needs

- Estimates of LGBTI population size
- Measures of public opinion and stigma
- Relationship between rights, inclusion, and growth
- Impact of laws, policies, and programs on LGBTI people
- Links to prevailing gender norms
- Impact and prevalence of conversion therapies
- Migration and forced movement
- Research to assess new methods and survey questions

3. Strategic Investments to Jumpstart the Revolution

The high-priority research needs outlined in section 2 would support the work of national governments to advance inclusion and respect for the rights of LGBTI people in the SDGs, and such projects would also have value for other national and global stakeholders. To generate that high-priority data and knowledge, three complementary investment strategies are needed: the first builds the research infrastructure to meet the knowledge needs, the second is the LGBTI Inclusion Index, and the third targets research on additional specific priorities identified by LGBTI civil society.

Recommendation 1: Invest in capacities and partnerships between governments, LGBTI civil society groups, academics, multilateral institutions, the private sector, and other stakeholders to create an infrastructure for LGBTI data collection and research.

To meet the significant challenge of addressing the momentous data and research needs for the SDGs and LGBTI Inclusion Index, a global research infrastructure will need to be created. This research infrastructure will be made up of the resources and activities necessary to produce knowledge about LGBTI people and would include representatives from government, civil society, human rights and development institutions, other funders of research, and academia (see figure 1 above). The infrastructure would necessarily be decentralized, given the wide range of local contexts in which LGBTI people live and with which researchers must contend. As was learned from the research infrastructure built up during the HIV/AIDS epidemic, an LGBTI research infrastructure will need to be adaptable and flexible so that over time, new research technologies, new research areas, and new funding opportunities can be incorporated, early research questions can be elaborated on, current and future needs can be addressed, and relevant and useful findings can be produced and disseminated.⁵⁵

Building a research infrastructure on LGBTI people and issues means investing in five general components:

(a) Invest in strategic networks in countries and regions to develop instruments and methodologies for survey and administrative data collection and to lead educational efforts with governments.

High-quality data on LGBTI people will be essential for meeting the needs of the SDGs and the LGBTI Inclusion Index, as well as for other research. Particular countries or regions might be ripe for relatively quick wins in adding SOGIESC questions to national surveys. Well-funded national or regional networks of researchers could work on the development of sampling methods and survey questions that can be used to study LGBTI people in those countries or regions. Acting as an expert panel, those researchers can then educate and persuade government statistical agencies to add those questions to current surveys or to undertake LGBTI-specific surveys. For

⁵⁵ For an analysis of the HIV infrastructure, see D. Ribes and J. Polk, "Organizing for Ontological Change: The Kernel of an AIDS Research Infrastructure," *Social Studies of Science* 45, no. 2 (2015): 214–41.

example, networks of researchers and activists in the United States deployed an effective theory of change built on the observation that government statistical agencies are influenced both by the scientific community and the political climate; as a result, new research plus educational efforts were successful in getting U.S. surveys to add sexual orientation and gender identity questions.⁵⁶ A second example of expanding data comes from gender equality advocates' efforts to add a module on domestic violence against women to the Demographic and Health Survey (DHS), funded by the U.S. Agency for International Development (USAID), to estimate the prevalence of domestic violence within and across countries.⁵⁷ That module was first added in 1998 and is now included in 91 surveys.

(b) Invest directly in government capacity on LGBTI inclusion and human rights by supporting government research and data collection on LGBTI issues.

Donors could enhance a country's ability to promote the inclusion and human rights of LGBTI people by investing in government research and data collection capacity. For example, a donor could: invest in building the capacities of national statistical offices, specific ministries/sectors, and/or national institutions to undertake data collection and analysis of relevant LGBTI issues; or commission existing government agencies or government-funded research institutes to produce knowledge on LGBTI people. Research connected to a government agency might also raise the status of its efforts in the eyes of the news media, general public, and academic audiences. Also, investments in government statistical agencies, or grants to academic or other institutions to undertake pilot surveys or methodological research on SOGIESC questions, might move those questions into large-scale government surveys much more quickly.

(c) Invest in communication and collaboration between researchers and the LGBTI community to ensure knowledge that is relevant and useful.

Experience demonstrates that activists and researchers want to be connected so that research is relevant, but effective communication and collaboration take time, energy, and resources. LGBTI civil society groups and actors should be engaged in the research process, including in the selection of research priorities, data collection, data analysis, and the communication of research findings. This need to pull activists and researchers together generates another important investment opportunity that can be met in a number of ways, and support could go to several types of collaboration: *formal consultations* that provide activists with a voice to communicate research priorities to researchers;⁵⁸ *relationship building and the creation of*

⁵⁶ Two networks in the United States have produced influential best practice guides: Sexual Minority Action Research Team (SMART), "Best Practices for Asking Questions about Sexual Orientation on Surveys" (Los Angeles, CA: The Williams Institute, UCLA, 2009), <http://williamsinstitute.law.ucla.edu/wp-content/uploads/SMART-FINAL-Nov-2009.pdf>; and Gender Identity in U.S. Surveillance Group (GenIUSS), "Best Practices for Asking Questions to Identify Transgender and Other Gender Minority Respondents on Population-Based Surveys" (Los Angeles, CA: The Williams Institute, UCLA, 2014), <http://williamsinstitute.law.ucla.edu/wp-content/uploads/geniuss-report-sep-2014.pdf>.

⁵⁷ Klugman and others, *Voice and Agency*.

⁵⁸ This point was emphasized in the consultations at the Uruguay conference.

spaces for collaboration that bring researchers and activists together in formal or informal ways; *participatory research strategies* that involve LGBTI activists at many stages of the research process; and *capacity building* of LGBTI organizations to learn data collection and analysis skills. These strategies for communication and collaboration could either be funded independently or folded into specific research projects.

(d) Invest in the expansion of a robust academic infrastructure to produce new researchers.

More researchers are needed who are able and willing to work on LGBTI topics in government, academic, and NGO settings. The current number of researchers studying these issues across universities, governments, and NGOs is too small to carry out an SDG-related research agenda in only 10 countries, much less on a global scale covering 193 countries. Increasing funding and access to data would make more research possible. However, scaling up will also require funding to train many more new and existing researchers in best research practices. Through universities and government agencies, funders could support a number of different activities to benefit researchers: online or in-person courses on research methods and existing research; fellowships for masters, doctoral, and post-doctoral students; mentoring programs to match new researchers with more experienced ones; translations of existing studies; publication of open-access journals; and meetings for the sharing of research.

Investments in technology and course content that allow academics to teach research methods to new researchers and to LGBTI groups outside of academia may yield long-term and sustainable growth in research capacity. This may be especially pertinent to NGOs that have expressed an interest in research and data collection but currently lack the capacity and experience to undertake it. At present, the capacity to collect and use data varies significantly across countries.⁵⁹

(e) Engage the private sector and support partnerships between companies, researchers, and LGBTI NGOs.

The private sector has the capacity to support and enrich the research needed for LGBTI inclusion and rights protection. Aside from partnerships based on big data analysis (see section 2 above), some companies can partner with researchers and LGBTI organizations to better understand the treatment of their employees and how to provide appropriate services to their customers. For example, some companies are beginning to utilize the Human Rights Campaign's Corporate Equality Index to determine if LGBT (not including intersex) staff receive equal benefits or face barriers in being hired. This data allow the tracking of practices promoting equality that may also boost overall labor productivity and larger societal goals. Additionally, some private health providers have begun to offer support for gender-confirming surgeries and hormone treatments. Research with LGBTI groups can determine if private health care plans appropriately support their unique needs and concerns—noting the predominance of private

⁵⁹ This point was also emphasized in the discussions at the Uruguay conference.

health care plans in some contexts.⁶⁰ Additionally, and perhaps due to the rise in corporate social responsibility, some companies are donating to NGOs and social causes. This funding can be leveraged to support the research needs of LGBTI people in developing and middle-income countries.

Recommendation 2: Invest in the establishment and operationalization of the UNDP-led LGBTI Inclusion Index (contributing to the national capacity building outlined in Recommendation 1 of government, civil society, and academia) to undertake the targeted research required for each of the identified priority dimensions of the LGBTI Inclusion Index: health, economic well-being, personal security and violence, education, and political and civic participation.

The dimensions of the LGBTI Inclusion Index are a particularly important focus, since the index will be a global benchmark for progress in inclusion that, according to LGBTI activists, will have enormous value. The index will require the collection of data from all countries where such information is available, as well as investments in new LGBTI-specific data collection, including data that can be disaggregated across the different LGBTI subgroups, with a view to increasing the number of participating countries. This will also have major positive spillover effects, since the valuable data and knowledge produced by the index can also be used in many other projects.

Although the UNDP-led LGBTI Inclusion Index is a large research and capacity-building undertaking, the five dimensions lend themselves well to collaborative efforts between different funders who might prefer to focus on one or two dimensions in the short, medium, and/or long term (see figure 2). Accordingly, one potential template for a process might include these stages:

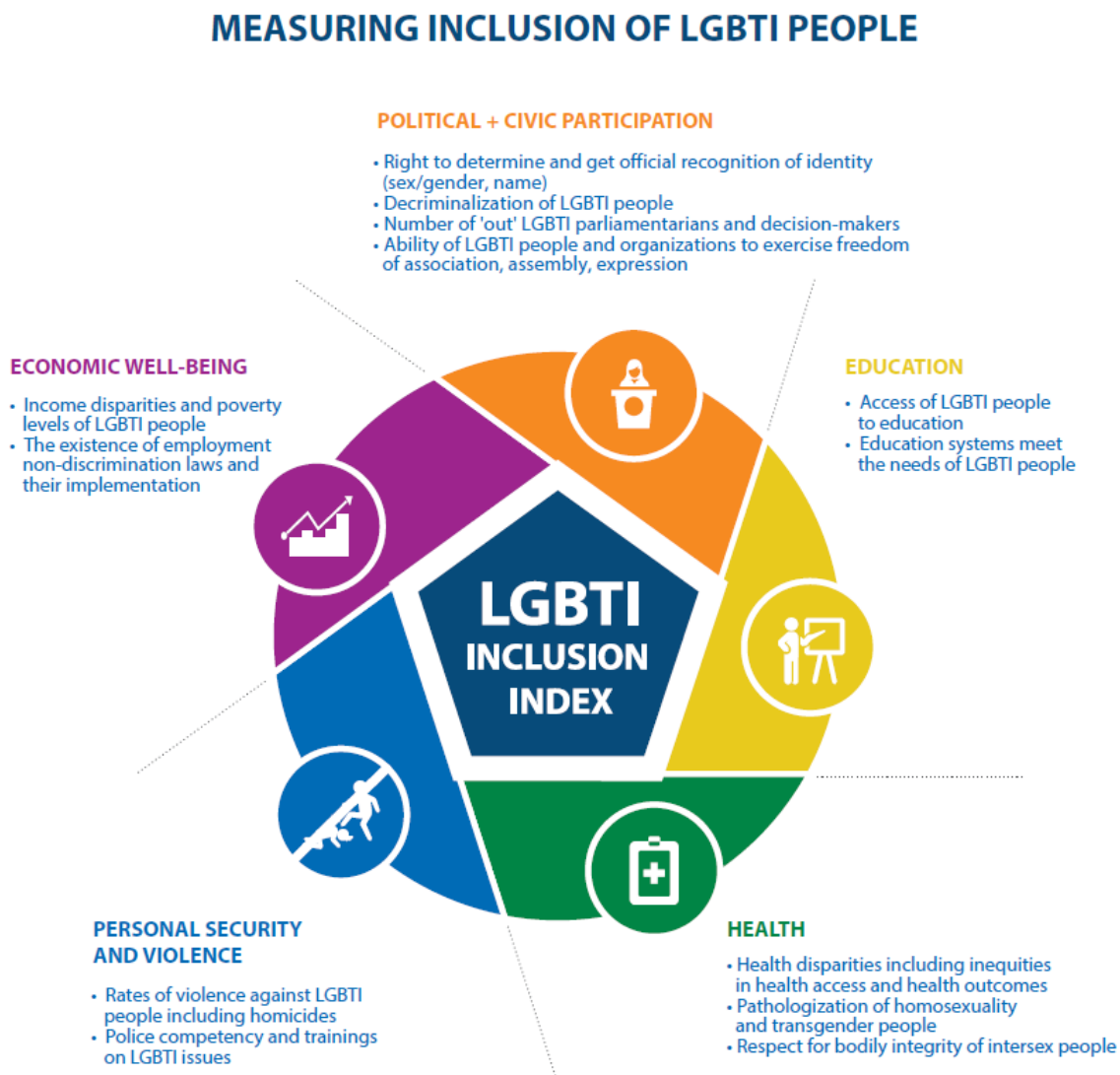
- *Short-term investments (first 12 months):* Funding to design, establish, and maintain a platform or repository to house the data on LGBTI inclusion to be collected over time, and support for a team of researchers to (i) assess existing data on the five priority dimensions, (ii) identify proxy indicators and agree on the approaches to gathering existing data that would be drawn on for the data collection envisaged by the LGBTI Inclusion Index, and (iii) develop LGBTI-specific indicators against which new data would be collected as well as appropriate methodologies for collecting this data in various country contexts.
- *Medium-term investments (12–48 months):* Resourcing partnerships at the global level (civil society, academia, government, multilaterals) for mining and analyzing the data using proxy indicators in all countries where relevant data exist and issuing analytical reports; establishing and resourcing national partnerships (government, civil society, academia) to undertake the research for data collection of LGBTI-specific indicators in 20–25 countries, ensuring the inclusion of low-, medium-, and high-income countries across all regions. Capacity building for national data collection, funding to maintain the

⁶⁰ This is another point that was raised at the Uruguay conference.

data repository, and advocacy activities to engage additional governments to participate in the data collection.

- *Long-term investments (48–60 months and beyond):* Providing resources for expanding new research efforts and adding additional countries where data collection is undertaken, ensuring a balance of participating countries from all regions and country typologies, maintaining the data repository, continuing to build national capacities for LGBTI data collection, regularly issuing analytical reports, supporting advocacy for data collection on LGBTI inclusion, and providing technical assistance to countries to utilize the data and analysis to inform national policies and programs.

Figure 2: Measuring the Inclusion of LGBTI People



Recommendation 3. Investing in existing, new, or future research priorities identified by LGBTI civil society groups, whether related to local, national, regional, or global issues.

In addition to the LGBTI Inclusion Index–related measures, section 2 presents many other important research priorities that have been mentioned by at least some activists in particular contexts, as listed in box 1: migration, conversion therapies, measures of stigma and public opinion, links to gender norms, and the impact of laws, policies, and programs. Additional funding opportunities for such research can be tailored to the needs expressed by local, national, or regional CSOs. Also, increasing the availability of general research funding would facilitate innovation and research into under-explored aspects of the LGBTI experience by social and health scientists who seek to more fully understand the lived experiences of LGBTI people.

Invest in projects that LGBTI civil society groups have already identified as priorities: Many LGBTI NGOs have expressed interest in being more involved in the choice of research projects but lack the necessary funding to finance them. An investment in the priorities they identify may yield knowledge that they can tailor to their own efforts to influence policy.⁶¹ Additionally, some research projects are already under development by LGBTI NGOs, whether on their own or in concert with other researchers.

Invest in researchers and activists to create a research agenda and pilot projects on intersex people: One particularly large gap that calls for a research initiative, including pilot research projects, concerns intersex people’s lives and concerns. The UNDP-led LGBTI Inclusion Index validation meeting clarified that the current research and data strategies related to sexual orientation and gender identity questions will not be adequate for an understanding of the challenges faced by people with variations in sex characteristics. Already, intersex groups have called for unbiased and peer-reviewed research on the impact of both non-binary sex characteristics and nonconsensual “normalizing” surgery on health outcomes—including mental health.⁶² Additionally, nonmedical research on the social, economic, and health issues for intersex people is at a relatively early stage, with some recent projects showing promise.⁶³ A concerted effort to identify intersex-specific research priorities and to begin pilot studies would provide useful knowledge as well as guidelines for the LGBTI Inclusion Index and other research projects.

Look for projects to support that target other under-researched groups: Research gaps are broad and deep for all subgroups of the LGBTI population. However, as noted in section 2, some groups are especially under-researched, for example, transgender men and women as well as low-income LGBTI people.

⁶¹ This point was emphasized in consultations at the Uruguay conference.

⁶² This goal may be challenging to achieve. In many contexts, the medical establishment tends to promote compulsory surgery at birth or in early childhood. In addition, there are inadequate policies to ensure that people born with variant sex characteristics are able to provide informed consent throughout their lives. This is another topic that was emphasized in consultation with LGBTI organizations and institutional partners at the Uruguay conference.

⁶³ T. Jones and others, *Intersex: Stories and Statistics from Australia* (Cambridge, UK: OpenBook Publishers, 2016).

Box 2: Recommendations for Strategic Investments

Recommendation 1. Fund the development of capacity and partnerships between governments, LGBTI civil society groups, academics, multilateral institutions, and other stakeholders to create an infrastructure for LGBTI research and data collection.

Recommendation 2. Fund the establishment and operationalization of the UNDP LGBTI Inclusion Index (contributing to the national capacity building outlined in Recommendation 1 for government, civil society, and academia) to undertake the targeted research required for each of the identified priority dimensions of the LGBTI Inclusion Index: health, economic well-being, personal security and violence, education, and political and civic participation.

Recommendation 3. Fund existing, new, or future research priorities identified by LGBTI civil society groups, whether related to local, national, regional, or global issues.

4. Conclusion: What Success Will Look Like

If sufficient strategic investments are made in LGBTI research and data collection, the knowledge about LGBTI people will increase dramatically and empower countries and LGBTI people to move toward the achievement of many of the SDGs and the promise to promote inclusion and respect for human rights for all—with no one left behind. There will be a broad and active infrastructure at the national and global level that is sustained by funding for priority research, including government participation in producing new data and studies. That research will inform and generate new programs, policies, and investments for LGBTI inclusion and human rights protections.

The knowledge generated will be relevant, timely, and useful for decision making by LGBTI people, civil society groups, policy makers, development agencies, private philanthropy organizations, and businesses. The interactions between governments, multilateral and bilateral institutions, researchers, and CSOs will create a sustainable flow of research:

Researchers in academia, government agencies, multilateral and bilateral development institutions, and LGBTI NGOs will be conducting quantitative and qualitative research on LGBTI people in every sizable country. They will have courses and materials to teach students and other researchers how to do more of that research. Researchers will have financial support, data, publication outlets, and access to existing research. Networks of researchers will provide expertise to the public, push each other to expand knowledge, and develop new methodologies to better answer difficult questions.

Policy makers, national statistical agencies, funders, human rights and development agencies, businesses, NGOs, media outlets, health professionals and agencies, and other end users of research will know about new problems and have new research-based strategies and evidence to address them. Research users will generate and suggest new questions and ideas for research, and some will be active participants in the new research projects.

Donors will provide financial and data resources to develop and continue this process. They will be actively shaping the progression of knowledge to contribute to the inclusion of LGBTI people and respect for their human rights.

LGBTI people will have access to research findings that speak truth about their lives in accessible forms that they can use to advocate for social, legal, and political change. They will have research and data to support their work toward full inclusion and respect for their rights in the context of the global sustainable development commitment to eradicate poverty and inequality.

ANNEX: Methodology

The analysis and recommendations in this paper come from a variety of sources. The primary authors have met with researchers and lesbian, gay, bisexual, transgender, and intersex (LGBTI) nongovernmental organizations (NGOs) in a variety of countries and contexts to discuss LGBTI-related research, including through numerous meetings on these issues with stakeholders from around the globe. LGBTI and research stakeholders include those from the United States, Europe, South America, China, Kenya, and the Republic of Korea, and institutional stakeholders include a variety of institutions, such as the United Nations Development Programme (UNDP), the Office of the United Nations High Commission for Human Rights (OHCHR), the U.S. Agency for International Development (USAID), the World Bank, the Inter-American Development Bank (IDB), and the Organisation for Economic Co-operation and Development (OECD). Feedback was also received from OutRight Action International and the International Lesbian, Gay, Bisexual, Transgender and Intersex Association (ILGA), two ECOSOC-accredited global LGBTI organizations that work in multiple regions around the world. Altogether, these discussions included the challenges faced by researchers, the needs of civil society, and the resources required to build capacity. In addition, UNDP conducted an extensive consultation process with a variety of stakeholders to develop the LGBTI Inclusion Index.

Input was also sought about the question of communicating the research priorities of LGBTI activists and civil society groups to scholars by requesting information on several listservs that included researchers, civil society organization leaders, activists, and funders. Less formally, there were in-person discussions about this topic with activists and academics from a variety of fields and geographic locations, including some from the Global South. Additionally, a draft of this report was circulated to stakeholders in LGBTI organizations, key institutions, the funding community, and researchers for feedback.

Finally, the authors and institutional partners presented and discussed this paper at the 2016 conference, *Global LGBTI Human Rights Conference: Non-Violence, Non-Discrimination, and Social Inclusion*, in Montevideo, Uruguay in July 2016.⁶⁴ Specifically, the authors and partners invited conference participants to a side event to present this paper's main arguments and gather feedback on research priorities, strategic investments, and any additional concerns. During these extensive discussions, over 40 conference participants joined in and represented a diversity of organizations and institutions from different regions, think tanks, governments, and bilateral aid agencies. This final version incorporates this significant feedback from conference participants.

As per UNDP and World Bank quality assurance processes, this paper was separately peer reviewed by both institutions to ensure quality and accuracy. This final version incorporates edits and comments from the peer reviewers.

⁶⁴ See the website, Global LGBTI Human Rights Conference at <http://www.lgbtimontevideo2016.org/en/>.

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