



# FEMINIST EPISTEMIC JUSTICE IN THE EU AND BEYOND

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Part I & Part II

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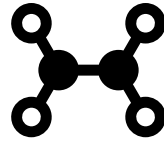
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# PART 1



# GENDER AND INTERNATIONAL DEVELOPMENT

Every book needs an engine, and for this one it is the persistent question of justice in knowledge. The story begins in the field of international development, where gender equality has long been championed as both a right and a condition for progress. From the expansion of girls' education to the integration of women into the workforce, international development has undeniably achieved milestones. And yet, the narrative is incomplete. Structural inequalities remain stubbornly intact, embedded not only in social and political systems but in the very ways we define, measure, and legitimise “knowledge” about development.

This tension—between progress and persistence—drives the momentum of this book. Development institutions, even when operating under the banner of equality, too often reproduce hierarchies: between North and South, men and women, elites and the marginalised. The result is that certain voices dominate while others are silenced; certain experiences are rendered visible while others are erased. This is not merely a material problem but an epistemic one: it concerns who is authorised to speak, whose testimony is believed, and which frameworks of meaning are taken seriously.

It is within this contested terrain that the Jean Monnet Chair on Feminist Epistemic Justice in the EU and Beyond (FEJUST) positions itself. FEJUST is not about simply “adding gender” to European or development studies. It is about unsettling the very epistemic ground on which these fields stand. It asks: Whose knowledge counts? Which experiences are legitimised? How can we move beyond Eurocentric, androcentric, and neoliberal perspectives toward more plural, feminist, and decolonial approaches?

The climax of this story—what gives it force and direction—lies in the promise of transformation. If we can diagnose the epistemic injustices within development and European policymaking, we can also imagine alternatives: institutions that recognise marginalised voices, concepts that capture lived experiences, and practices that redistribute authority. That is the aspiration that animates this book.

Each chapter develops part of this narrative arc. Emerging from the lectures, research, and outreach activities of FEJUST, the chapters do two things at once: they serve as teaching resources for students entering these debates, and they stand as scholarly interventions in their own right. In this first volume, the focus is on gender in international development. The aim is to build the conceptual and analytical foundations: exploring education, political representation, media, and development policies, and showing how each area reflects both advances and entrenched injustices.

The second volume will shift the lens explicitly to the European Union, interrogating how EU gender policies are designed, circulated, and practiced, and how they can be re-read through the lens of epistemic injustice. Together, the two volumes chart a trajectory from theory to practice, from global frameworks to EU-specific dynamics, and from diagnosis to transformation.

This opening chapter therefore begins by situating gender in international development, tracing its intellectual evolution and political stakes. It shows why this field is a necessary starting point for a broader reflection on epistemic justice and why, without grappling with gender and development, European studies risks reproducing the very injustices it claims to resist.

## GENDER (IN)EQUALITY: SEX AND GENDER DISTINCTION

# Sex and Gender

## Sex



## Gender



When we begin thinking about development, one of the most important distinctions to make is between sex and gender. Sex is commonly taken to mean the biological differences between males and females, such as chromosomes, reproductive organs, or secondary sexual characteristics. Gender, by contrast, refers to the ideas, expectations, and practices that societies construct around these biological categories. It is not something we are born with in a fixed way, but something we learn, perform, and reproduce through our everyday interactions.

Feminist scholars have been central to showing us that gender is a social system. Judith Lorber argued already in the 1990s that gender is not simply an attribute of individuals but a social institution that organises society itself. Joan Scott similarly framed gender as a primary way of signifying power relations, making clear that it is not just about identities but about how difference and inequality are produced and justified in culture, politics, and institutions. Judith Butler then deepened this understanding with her notion of gender performativity. For Butler, gender is not a stable identity but an effect of repeated acts — the ways we speak, dress, move, or behave. Every repetition reinforces the system of gender norms, yet at the same time repetition opens space for resistance and subversion.

Raewyn Connell introduced the concept of the gender order to describe how societies organise masculinities and femininities hierarchically, ensuring that some forms of gender expression dominate others. Her notion of hegemonic masculinity is especially useful in showing how development policies often reinforce unequal hierarchies of gender unless they are deliberately challenged. Cecilia Ridgeway adds another layer by showing how gender functions as a “primary frame” of social cognition. People habitually judge competence, authority, or leadership potential through gendered expectations, which helps explain why women, even when equally qualified, are often perceived as less authoritative or capable than men.

These theories are not abstract; they explain how we experience the world from childhood onwards. Families socialise children into gender roles in subtle but powerful ways. In schools, teachers and curricula reproduce ideas about what girls and boys are “good at,” which can channel them into different fields of study and work. In marriage and family law, expectations about who should provide, care, or inherit property continue to reinforce male authority in many societies. In professional life, we can see how “masculine” occupations such as engineering or politics are valued differently from

“feminine” ones like teaching or nursing. Media images circulate cultural scripts about masculinity and femininity, shaping what we imagine is possible for men and women.

In the context of development, these gendered structures are crucial. If we see only “women” as a vulnerable group that needs to be integrated into projects — as in the early “Women in Development” approaches of the 1970s — we miss the deeper issue of power relations. Later feminist critiques, especially the “Gender and Development” perspective, insisted that development must address how relations between women and men organise labour, resources, and decision-making. Without this shift, development risks reinforcing the very inequalities it aims to solve.

This is why we start the course here. The distinction between sex and gender is not a technicality but a lens that reveals how inequalities become naturalised. It helps us see why development policies that appear neutral can have profoundly gendered effects. And it prompts us to ask critical questions: how are gender roles learned and reproduced? How do they structure access to opportunities? And how might development policies unintentionally reproduce these inequalities if they do not take gender seriously?

Prompt questions: How were you taught to behave “as a girl” or “as a boy” in family or school settings? Can you recall an instance when someone challenged these expectations? What would development policy look like if it took such experiences seriously rather than assuming gender neutrality?

Once we understand that gender is socially constructed and deeply embedded in institutions, we can start to see the multiple and overlapping outcomes of gender inequality in everyday life as well as in development policies. Gender inequality is not an abstract idea; it produces concrete disadvantages that affect people’s access to education, employment, resources, political participation, and personal autonomy.

One clear outcome is the persistence of gender segregation in education and work. Girls and boys may attend the same schools, but social norms and stereotypes shape the subjects they are encouraged to pursue and the careers they imagine for themselves. As Naila Kabeer (1999) argues, access to education is not only about enrollment numbers but also about what knowledge is valued, how curricula reinforce gender roles, and whether girls are enabled to translate schooling into economic opportunities. In many societies, women are still channeled into lower-paid, lower-status jobs, while men dominate in science, technology, and leadership roles. This occupational segregation reinforces cycles of inequality, since women’s work is often undervalued and underpaid.

Another outcome is unequal access to resources. Women often face structural barriers to owning land, obtaining credit, or inheriting property. Development studies show that these restrictions are not incidental but deeply tied to patriarchal legal and cultural systems that place women in dependent positions. Amartya Sen (1990) highlighted the concept of “missing women,” showing how discrimination in access to nutrition, healthcare, and resources leads to stark demographic imbalances in parts of the Global South. These are not just matters of inequality but of survival.

Early-age marriages illustrate how gender inequality intersects with age and power. In many contexts, young girls are married off as part of economic or social arrangements that limit their opportunities for education and expose them to health risks. Early marriage is often justified in cultural terms but functions as a mechanism for controlling female sexuality and labour. Studies from UNICEF and UN Women consistently show that early marriage correlates with lower educational attainment, higher risks of maternal mortality, and cycles of poverty.

## BEYOND GENDER: INTERSECTIONALITY AND MULTIPLE HIERARCHIES

So far, we have explored how gender operates as a social system that organises society and structures inequality. But gender never works alone. The lived realities of women, men, and non-binary people are shaped simultaneously by other axes of power and identity such as race, class, age, sexuality, ability, religion, and migration status. To capture these overlapping and compounding inequalities, we turn to the framework of intersectionality.



The term intersectionality was coined by **Kimberlé Crenshaw** (1989) in her landmark analysis of anti-discrimination law in the United States. She showed how Black women plaintiffs were excluded because courts treated race discrimination (aimed at Black men) and gender discrimination (aimed at white women) as separate, mutually exclusive categories. Black women's unique experiences of combined racism and sexism were invisible in both frameworks. Crenshaw's intervention highlights a central point: systems of oppression do not operate separately; they interlock. Race, gender, and class shape one another in ways that cannot be reduced to one dimension alone.

When we turn to the field of international development, the importance of intersectionality becomes especially clear. Development projects and policies frequently speak in broad, seemingly inclusive categories: they aim to help "women," "the poor," or "migrants." While these categories may be politically useful, they can also be dangerously simplistic. They risk assuming that the members of each group share the same experiences and face the same challenges, when in reality their lives are shaped by multiple, overlapping systems of inequality.

Women, for instance, are often treated as a homogenous category in development discourse. Yet the experiences of an elite, urban professional working in an international NGO differ profoundly from those of a rural Indigenous woman struggling with land dispossession. Both may be women, but their encounters with development policies, institutions, and opportunities are filtered through class, race, ethnicity, and geography. When policy frameworks fail to take these differences into account, they inadvertently reproduce inequalities even as they claim to promote empowerment.

Class intersects with gender in ways that are often invisible in policy design. A poor woman may face barriers to healthcare, education, and political participation that her wealthier counterparts can navigate with greater ease. Similarly, race and colonial legacies continue to shape whose voices are heard and whose knowledge is valued. Chandra Talpade Mohanty's famous critique of "Third World women" in development discourses reminds us that women from the Global South are often depicted as passive victims in need of saving by Western institutions, a portrayal that not only erases diversity but also perpetuates colonial hierarchies of knowledge.

Migration status further complicates this picture. Migrant and refugee women often experience gendered violence, precarious labour conditions, and systemic exclusion from social services. Their vulnerability is not reducible to gender alone; it is magnified by racialisation and by legal frameworks that deny them the protections afforded to citizens. Similarly, sexuality, age, or disability can compound exclusion in development settings, producing forms of disadvantage that cannot be explained by looking at gender or class in isolation.

What emerges from these examples is that intersectionality is not an abstract theoretical add-on but a necessary lens for analysing development. Without it, we fall into the trap of believing that "giving voice to women" is sufficient, when in fact only some women's voices are amplified while others remain silenced. This silence is not only political but also epistemic. It reflects deeper hierarchies about whose experiences count as legitimate knowledge, whose testimonies are taken seriously, and whose contributions to development are recognised. By adopting an intersectional framework, development studies can begin to address these epistemic injustices, ensuring that policies are not built on partial or distorted understandings of human experience but are instead attentive to the complexity of lived realities.

To see how intersectionality works in practice, it is useful to examine some concrete examples from the field of international development. These cases illustrate how well-intentioned policies can create uneven outcomes if they fail to take intersecting inequalities into account.

Consider first the case of **microcredit schemes**, which are often celebrated as a major success story for women's empowerment. By providing women with small loans, these programmes are supposed to open pathways to entrepreneurship, economic independence, and greater decision-making power within households. And indeed, some women have benefitted enormously from such schemes. But closer analysis shows a more complicated picture. Poor women, who are the primary targets of microcredit initiatives, often become trapped in cycles of debt because they lack secure income or collateral. In many cases, the responsibility for repayment falls squarely on them, while male household

members continue to control how loans are used. For women with more resources, microcredit can function as a springboard, but for those already marginalised by poverty, it can reproduce rather than dismantle inequality.

A second example can be found in **education policy**, particularly in efforts to expand girls' schooling. On paper, these initiatives have produced striking improvements in enrolment and attendance. Yet statistics alone conceal the persistent barriers faced by certain groups. Ethnic minority girls, refugee girls, or those with disabilities frequently encounter discrimination in classrooms, language barriers, or a lack of physical accessibility. Their educational opportunities are not only restricted by gender but by the intersection of gender with ethnicity, migration status, or disability. What looks like a success story at the aggregate level often hides continuing inequalities at the margins.

A third case comes from **labour migration**. Around the world, women from the Global South migrate to cities in the Global North or to wealthier regions within their own countries to take up work in domestic and care sectors. These women often find themselves in the most precarious employment, working long hours with little protection or recognition. Here, gendered expectations about women's "natural" caring roles intersect with racial stereotypes that mark migrant women as docile or submissive. Immigration laws further intensify this precarity by tying work permits to employers or restricting access to labour rights. These overlapping factors make migrant women particularly vulnerable to exploitation, showing how intersectionality illuminates the structural nature of their disadvantage.

Finally, **climate justice movements** provide another illustration. Indigenous women are often at the forefront of environmental activism, defending land, water, and ecosystems from corporate extraction. Yet their knowledges are routinely sidelined in global climate negotiations, dismissed as anecdotal or "traditional" rather than scientific. Here, gender, indigeneity, and colonial histories intersect to create epistemic injustice: not only are Indigenous women disproportionately exposed to environmental harm, but their knowledge about ecological sustainability is disqualified in policy forums that privilege Western scientific frameworks.

Each of these examples underscores a central lesson: development outcomes cannot be adequately understood through single-axis analyses of gender, class, or race alone. Intersectionality draws our attention to how inequalities overlap and reinforce one another, often in ways that are invisible to policymakers. Without such a perspective, development risks reproducing the very hierarchies it seeks to challenge.

The framework of intersectionality has been developed and enriched by a wide range of scholars, each of whom brings different insights into how overlapping systems of oppression operate. Particularly, **Patricia Hill Collins**, in her influential work *Black Feminist Thought* (2000), introduced the idea of a "matrix of domination." Collins argued that systems of oppression — including race, class, gender, and sexuality — are not separate layers that can be peeled apart, but rather interlocking structures that form an overall pattern of domination. For example, the experience of a working-class Black woman cannot be fully understood by adding together "racism" and "sexism." Her social position is shaped by the simultaneous and intersecting operation of both systems, which create a unique standpoint. Importantly, Collins also highlighted that marginalised groups generate distinctive forms of knowledge from their lived experiences, which challenge dominant narratives and provide critical perspectives on power. Intersectionality teaches us that categories of inequality cannot be understood in isolation. To deepen this analysis, we now turn explicitly to the concepts of race and ethnicity, both of which have played a defining role in shaping international development and the global distribution of power.

Intersectionality is often easiest to grasp when we move beyond theory and look closely at how race and ethnicity, alongside gender, class, and other categories, structure people's lives. Race refers to physical variations, such as skin colour, that societies mark as socially significant. Although race has no biological foundation, it has carried extraordinary political and economic weight. In the nineteenth century, pseudo-scientific racial theories divided humanity into categories such as "white," "black," and "yellow," attaching fixed qualities to each. These theories were used to justify slavery, colonial

domination, and imperial expansion. Their legacies still shape global hierarchies of privilege and marginalisation.

The United States provides a stark illustration. From slavery and the racial terror of Jim Crow to exclusionary immigration regimes and today's struggles over police violence and mass incarceration, race has been central to determining access to rights and resources. Whiteness functioned as a category of privilege, conferring full citizenship and protection under the law, while Black, Indigenous, and other racialised groups were systematically excluded. These patterns remind us that development cannot be understood without analysing the racial orders that organise global and national inequalities.

Alongside race, we must also consider ethnicity. While race is tied to physical markers, ethnicity refers to cultural practices such as language, religion, history, and styles of dress. Ethnic identities are not fixed essences but dynamic constructions, often defined both by communities themselves and by external actors. In development contexts, ethnicity can be a source of empowerment and solidarity, but it is equally a basis for exclusion, stereotyping, or even violence. Policies that treat all citizens as formally "equal" often ignore the systemic barriers faced by ethnic minorities in accessing education, healthcare, or political representation.

This is where the idea of minorities becomes important. A minority is not necessarily a numerically small group; rather, it is a group that is disadvantaged in relation to a dominant majority. Women, for instance, make up roughly half of the global population, but are often treated as a minority in political and economic life. Minority status is defined by power relations — by who gets to set the norms, who controls institutions, and who decides what counts as legitimate knowledge.

The disadvantages faced by minorities operate at both the attitudinal and structural level. Prejudice refers to stereotypes or fixed beliefs about a group — for example, the assumption that certain people are naturally suited to particular types of work. Prejudice operates in the realm of attitudes and opinions but often has real consequences.

Discrimination occurs when prejudice is translated into action. It manifests in landlords refusing to rent to migrants, employers overlooking qualified women of colour, or schools funnelling minority students into lower-achieving streams. These actions directly restrict people's access to opportunities.

Racism encompasses both prejudice and discrimination but extends further: it refers to the embedding of racial hierarchies into the very structures of society. Racism is not confined to extremist groups or individual acts of hate. It can be institutional — built into laws, policies, and everyday practices. Racial profiling in policing, immigration laws privileging some groups over others, and funding mechanisms that disadvantage minority neighbourhoods all exemplify institutional racism. This is why racism must be understood as more than personal bias; it is about systemic patterns of exclusion.

It is important to recognise that the forms racism takes have changed over time. Legal segregation in the United States and apartheid in South Africa have formally ended. Few people today openly defend biological racism. Yet this does not mean racial inequality has disappeared. Instead, it has often been recast in cultural terms. This so-called new racism avoids explicit biological arguments but continues to justify exclusion by appealing to cultural differences. It appears in policies that restrict the use of minority languages, in school curricula that erase non-Western histories, or in laws banning religious dress such as the headscarf. The claim is not that some groups are biologically inferior, but that their cultural practices are incompatible with the norms of the dominant society. This cultural racism sustains the same hierarchies under the guise of neutrality or even liberal values.

A related phenomenon is color-blind racism — the idea that society should act as if race no longer matters. While this may sound progressive, it often serves to perpetuate racial inequality by denying its existence. If society claims to be "color-blind," then ongoing structural disadvantages faced by racialised groups are dismissed as personal failings rather than systemic problems. The "colour line" remains in place, even if more people refuse to acknowledge it.

Placing these insights back into the frame of intersectionality, we can see that race and ethnicity are inseparable from gender, class, and other axes of identity. Development institutions have long

privileged white, Western, male perspectives, often portraying women and people of colour in the Global South as passive recipients of aid rather than active producers of knowledge. This exclusion is not only material but epistemic. It devalues the experiences and knowledges of racialised and minority groups, treating them as secondary or even irrelevant.

Intersectionality therefore requires us to analyse how race, gender, and ethnicity interact in practice. Only by acknowledging these overlaps can we begin to challenge epistemic injustice and move toward development policies and practices that are genuinely inclusive. Without this, we risk reinforcing the very hierarchies we claim to resist — repackaging them in the language of neutrality, universality, or even empowerment.

This persistence of racial hierarchies under the guise of neutrality or liberal values reminds us that inequality is rarely confined to a single axis of identity. Color-blind racism illustrates how even well-intentioned claims to equality can obscure the structural barriers that continue to disadvantage racialised groups. By shifting responsibility onto individuals rather than institutions, it masks the systemic reproduction of privilege and exclusion.

When we situate this within an intersectional frame, it becomes clear that race and ethnicity cannot be separated from other dimensions of identity such as gender, class, and nationality. Development institutions, in particular, have historically privileged white, Western, male perspectives, often rendering women and people of colour from the Global South as passive recipients rather than knowledge-bearers in their own right. This is a form of epistemic injustice: it delegitimises entire bodies of lived experience and ways of knowing.

Recognising this is crucial because it allows us to see how hierarchies are reproduced across multiple domains at once. And this, in turn, sets the stage for our next discussion. Just as race and ethnicity cannot be disentangled from questions of power and knowledge, neither can gender inequality be understood in isolation from development processes. To truly grasp how inequalities persist, we must now turn to the question of gender (in)equality and development, and examine how gendered power relations shape — and often distort — the goals of international development.

## GENDER (IN)EQUALITY AND DEVELOPMENT

At this point it is important to underline that none of these issues — gendered socialisation, segregation in education and work, unequal access to resources, early marriage, or underrepresentation in politics — exist in isolation. They are all deeply tied to development outcomes.

International development is often defined as the process of improving social, economic, and political conditions for people across the world. But as feminist scholars such as Caroline Moser (1993) and Naila Kabeer (1999) have shown, if development policies ignore gendered power relations, they risk reproducing inequality rather than alleviating it. For instance, expanding education without addressing gender stereotypes may increase school enrollment for girls, but it may not lead to equal employment opportunities if labour markets continue to devalue “women’s work.” Similarly, microcredit schemes that target women can increase income in the short term, but if women lack property rights or bargaining power in the household, the benefits may be captured by male relatives.

The United Nations has recognised this link by embedding gender equality into the Sustainable Development Goals (SDG 5). But gender is not only a separate goal; it is also a cross-cutting principle that affects health, poverty reduction, climate resilience, and peacebuilding. Without tackling gender inequality, progress in these areas remains partial. Amartya Sen (1999) famously described development as freedom, but for many women that freedom is curtailed by everyday constraints on mobility, decision-making, and recognition.

*Why do you think so many development policies failed when they treated women simply as a “target group” rather than recognising gender as a structure of power? How does the concept of epistemic injustice help us to see the limits of development practices? Can you think of examples where women’s knowledge has been excluded from development projects, and what the consequences were?*



## PROMPT QUESTIONS

The concept of epistemic injustice sharpens this point further. Development is not only about distributing resources but also about producing and legitimising knowledge. If women’s voices are discredited (testimonial injustice) or if their experiences cannot even be articulated within dominant frameworks (hermeneutical injustice), then development policies will reflect only partial perspectives. This explains why, historically, development discourse often depicted women as passive beneficiaries rather than active agents — a form of silencing that Gayatri Spivak (1988) critiqued in her famous question, “Can the subaltern speak?” In many cases, development projects were planned without listening to the women most affected, resulting in programs that failed or even worsened inequalities.

All of this shows that gender inequality is not an add-on issue but a structuring force in development. It determines who has access to education, whose labour is valued, who participates in political decision-making, and whose knowledge counts as legitimate. Development without gender justice is incomplete development, and in some cases, it is not development at all but a continuation of existing hierarchies under a new label.

A further dimension is the underrepresentation of women in politics and decision-making. Even in regions that pride themselves on democratic values, women are less visible in parliaments, cabinets, and senior positions. Drude Dahlerup (2006) showed how quotas and critical mass theories were introduced in many countries to address this imbalance, yet numbers alone do not always guarantee influence if institutions remain patriarchal in their culture and practices. In development contexts, women’s participation is often treated instrumentally — as a way to make policies “more effective” — rather than being valued as a matter of justice and democracy.

These outcomes demonstrate that gender inequality is cumulative: exclusion in one sphere reinforces exclusion in others. If girls are pulled out of school for early marriage, their chances of economic independence diminish, which in turn reduces their political participation. If women cannot inherit land or obtain credit, they remain economically dependent and vulnerable to exploitation. If women are absent from decision-making tables, policies are more likely to ignore or marginalise their needs.

For development scholars and practitioners, the lesson is that gender inequality is not a single issue but a structure that shapes the distribution of resources, rights, and recognition. It intersects with class, race, ethnicity, and geography to produce differentiated outcomes. Addressing inequality, therefore, requires more than including women in existing frameworks; it requires transforming the underlying systems of power that keep reproducing these patterns.

Prompt questions: In your own context, where do you see the effects of gender segregation in education or work? How do laws or cultural norms regulate women’s access to resources like land, credit, or inheritance? Why do you think women remain underrepresented in politics even in societies that formally endorse gender equality?



## VIDEO RESOURCES

To complement this week's lecture, the following videos provide accessible insights into the concepts we have discussed. Each resource is linked to the course objectives, so you can see how it supports your learning.

[Henrik Ibsen's A Doll's House \(1973 adaptation\)](#)

This classic play vividly portrays the struggles of women in 19th-century Europe, illustrating themes of autonomy, dependency, and social expectation. Nora's decision at the end resonates with first-wave feminist demands for self-determination. The film helps you place feminist history into context, linking to the course objective of recognising how different waves of feminism shaped debates on rights, equality, and justice — foundations that continue to influence international development policies today.

[The Facts about Gender Equality and the Sustainable Development Goals](#)

Produced by the United Nations, this resource highlights the cross-cutting nature of gender equality within the 2030 Agenda. It demonstrates how gender justice is not only a standalone goal (SDG 5) but also essential for progress in education, health, climate, and peace. This supports the course objective of understanding how global development frameworks incorporate gender, while also allowing critical reflection on whether these frameworks sufficiently address structural inequality.

[Gender Equality – SDG #5](#)

This focused video introduces the aims of SDG 5 and discusses both achievements and remaining barriers in advancing gender equality worldwide. It helps situate the theoretical debates we cover in class in the context of contemporary international policy. Watching this video strengthens the objective of connecting feminist critiques with global development practice, encouraging you to think about the gap between policy rhetoric and lived realities.

[Integrating Human Rights, "Leave No One Behind," and Gender Equality into UN Cooperation Frameworks](#)

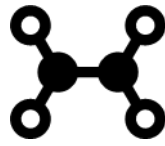
This UN training resource explains how gender equality and human rights are mainstreamed into cooperation frameworks at the country level. It illustrates how feminist and intersectional approaches can shape real-world planning, programming, and resource allocation. It supports the course objective of applying feminist epistemic justice to international development, showing how inclusive frameworks can challenge the marginalisation of women's voices and experiences.



## STUDY QUESTIONS

1. Think about how you were taught to behave “as a girl” or “as a boy” in your family, school, or community. Which of these expectations felt natural, and which felt restrictive?
2. How do schools, workplaces, or media in your own context reinforce gender roles? Can you identify an example where these institutions challenged or transformed gender norms instead?
3. Imagine a development project that aims to increase girls’ access to education. What steps would you take to ensure the project addresses deeper social norms and barriers, rather than just focusing on enrollment numbers?





## EPISTEMIC INJUSTICE AND RESISTANCE

Development is never only about the distribution of resources or the delivery of services. It is also, and perhaps more profoundly, about the production of knowledge. Every development agenda carries implicit answers to questions such as: What counts as progress? Whose needs are visible? Whose voices are heard and treated as authoritative? These are not neutral or technical issues. They are struggles over power and recognition, in which some ways of knowing are privileged while others are dismissed, silenced, or erased.



This chapter examines these dynamics through the lens of epistemic injustice, a concept introduced by Miranda Fricker (2007) and expanded by later feminist theorists such as McKinnon (2016). Epistemic injustice refers to the specific ways in which individuals and groups are wronged in their capacity as knowers. It draws attention to how credibility is unequally distributed, how some experiences are rendered unintelligible or misinterpreted, and how these exclusions reinforce broader patterns of inequality.

Our focus will be threefold. First, we will unpack the two central forms of epistemic injustice: testimonial injustice, where someone's word is given less credibility because of prejudice, and hermeneutical injustice, where the interpretive tools to make sense of one's experiences are absent or distorted. Second, we will trace how these injustices have been challenged historically through feminist movements, or so-called "waves" of feminism, each of which demanded credibility, recognition, and new interpretive resources. Third, we will consider how epistemic injustice operates in the global context of development and international politics, where Eurocentric frameworks and dominant institutional practices continue to marginalise diverse ways of knowing.



Placing epistemic injustice at the centre of our discussion makes it possible to see development not just as a matter of material redistribution but as a contest over whose knowledge shapes policies, priorities, and futures. In this sense, to study development through feminist epistemology is also to study resistance: the many strategies by which marginalised voices claim authority, create new interpretive frameworks, and unsettle the hierarchies that silence them.

## EPISTEMIC INJUSTICE: WHY TESTIMONY “GOES WRONG” SYSTEMATICALLY

Fricker’s core claim is that people can be wronged as knowers, suffering harm to their credibility and intelligibility (2007: 20). She distinguishes testimonial injustice and hermeneutical injustice, both located in a “credibility economy” where some speakers are pre-emptively believed and others doubted.

McKinnon (2016) develops this framework by asking why testimony so often goes wrong in patterned ways. Classical epistemology of testimony asks what conditions allow a hearer to know from a speaker’s say-so; McKinnon instead examines why credible speakers are systematically disbelieved. Credibility judgements are shaped by cues about speakers, delivery, background coherence, and structural features such as venue (McKinnon 2016: 438; Goldberg 2013, 2015). At each point, bias can intervene. Empirical research shows that a white man is more likely to be believed than a Black woman even when their credibility is equal (McKinnon 2016: 438). This is not mere error; it is structural injustice.

Fricker highlights credibility deficits, but McKinnon (2016: 440–41), drawing on Medina (2013), stresses that credibility excess for some groups directly produces deficits for others. In *The Talented Mr. Ripley*, Marge’s well-grounded suspicions are dismissed as “female intuition.” Her frustration is read as emotionality, feeding the very stereotype that undermines her credibility, creating a vicious feedback loop (McKinnon 2016: 439–40). In *To Kill a Mockingbird*, Tom Robinson’s testimony is unimaginable to the white jury; his compassion for a white woman is a “taboo sentiment” (Fricker 2007: 23ff). These cases exemplify how credibility economies reproduce gendered and racial hierarchies.

McKinnon further insists that we cannot separate epistemic from political injustice. Black feminist theorists such as Patricia Hill Collins long argued that epistemology reveals “who is believed and why” (2000: 270). That much of this earlier work achieved wide uptake only once Fricker codified the terms is itself an instance of epistemic injustice (McKinnon 2016: 438–39). In development, this dynamic is mirrored when the reports of international experts are treated as authoritative while local women’s testimonies are sidelined.

Hermeneutical injustice arises when a gap in interpretive resources blocks people from making sense of their own experiences (Fricker 2007: 147). As Fricker notes, “we try hardest to understand those things it serves us to understand” (2007: 152). Dominant groups control the interpretive lexicon, leaving marginalised experiences unintelligible. Before the term sexual harassment circulated, women knew they were wronged but could not name it, leaving the harm socially invisible.

McKinnon (2016) links this to the epistemology of ignorance: it is not only that marginalised groups lack concepts, but also that dominant groups refuse uptake even when concepts exist (Mason 2011; Pohlhaus Jr. 2012). Pohlhaus Jr. calls this wilful hermeneutical ignorance, where dominant knowers dismiss resources developed by the marginalised (2012: 715; cited in McKinnon 2016: 441–42). Dotson (2011) shows how this compounds with testimonial quieting (audiences refuse to treat someone as a knower) and testimonial smothering (speakers self-silence in anticipation of non-uptake).

Süleymanoğlu-Kürüm and Gençkal Eroglu (2023) extend this to the global scale, analysing how Eurocentric frameworks dominate interpretive fields, defining what counts as legitimate knowledge and modernity. In their study of Turkish media, local epistemes are forced to translate themselves into Eurocentric categories to gain recognition, while alternative ways of knowing are dismissed as deficient. This mirrors Chakrabarty’s call to provincialise Europe (2000): epistemic justice requires valuing plural interpretive traditions, not just expanding existing Eurocentric frames.

In development, these dynamics are palpable. Concepts like rape culture, unpaid care work, or Islamophobia may exist in feminist and community discourses, yet international institutions often resist recognising them, preferring technocratic categories. Fricker suggests hermeneutical injustice ends once new concepts circulate widely; McKinnon reminds us that injustice persists if dominant actors refuse to acknowledge or legitimise them.

## FEMINIST WAVES AS STRUGGLES FOR EPISTEMIC RECOGNITION

Having introduced the concepts of testimonial and hermeneutical injustice in the first part of this week's lecture, we can now view feminist history itself as a struggle for epistemic recognition. Feminism has never been only about claiming political rights or access to resources; it has also been about challenging the frameworks of knowledge that render women's experiences unintelligible, unreliable, or unworthy of attention. Each "wave" of feminism can therefore be read as a response to epistemic injustice: attempts to articulate women's knowledge in the face of its systematic erasure or devaluation.

The first wave of feminism, rooted in the nineteenth and early twentieth centuries, fought for suffrage, property rights, and access to education and professions. Women demanded recognition as rational subjects, equal to men under the law. The denial of legal and political rights reflected not only social and economic injustice but also testimonial injustice: women's voices in court, in parliament, and in the public sphere were discounted because of the assumption that women were less rational or less credible than men. As John Stuart Mill argued in *The Subjection of Women* (1869), this was not only unjust in itself but also a barrier to human progress. First-wave feminists sought to dismantle these credibility deficits, insisting that women's testimony in politics, law, and family life was just as valid as men's.

The second wave of feminism shifted the terrain from formal rights to everyday life. Beginning in the 1960s and 1970s, feminists declared that "the personal is political." Issues such as domestic violence, sexual harassment, reproductive autonomy, and unequal divisions of labour in the household were exposed as systemic injustices rather than private troubles. This was a direct response to hermeneutical injustice: before feminists named these problems, women often knew something was wrong but lacked the language or conceptual resources to frame their experiences as injustice. As Fricker (2007, p. 152) notes, "we try hardest to understand those things it serves us to understand," and patriarchal society had no incentive to develop interpretive tools for women's suffering. By naming sexual harassment, marital rape, and reproductive rights, second-wave feminists transformed private pain into recognised social injustice.

However, this wave was also limited by its exclusions. Mainstream second-wave feminism reflected the experiences of white, middle-class women in the West, leaving women of colour, working-class women, and women in the Global South on the margins. Their testimony was doubly discredited: first as women, and second as racialised or colonised subjects. This exclusion illustrates what McKinnon (2016) reminds us: hermeneutical gaps are rarely accidental but are maintained by structures of power that benefit from silencing the perspectives of the most marginalised.

The third wave of feminism, emerging in the 1990s, directly confronted these exclusions. It introduced intersectionality (Crenshaw, 1989) as a framework to understand how gender oppression intersects with race, class, sexuality, religion, and nationality. It also absorbed postcolonial and queer critiques, destabilising binary categories of male/female, heterosexual/homosexual, and Western/non-Western. In doing so, the third wave moved from resisting patriarchal structures to challenging the epistemic categories that made those structures possible. Judith Lorber (1997) describes this as the shift from resistant feminism to rebellious feminism: no longer content with seeking equality within existing categories, feminists now sought to deconstruct the categories themselves.

At the global level, this epistemic struggle resonates with what Süleymanoğlu-Kürüm and Gençkal Eroler (2023) call the marginalisation of "alternative modernities." Eurocentric frameworks in development and international politics define what counts as knowledge, leaving other epistemes unintelligible. This global hermeneutical injustice parallels the silencing of women in earlier feminist

waves: both involve entire groups being denied the conceptual tools to articulate their realities in ways that dominant structures will recognise. Third-wave and decolonial feminisms therefore align in their demand for epistemic pluriversality — the recognition of multiple ways of knowing and being.

## LORBER'S THREE THEORIES OF FEMINIST INEQUALITY

Judith Lorber (1997) provides a useful typology for understanding how feminists have theorised gender inequality across these waves: reformist, resistant, and rebellious feminisms. Each theory responds to epistemic injustice in distinct ways.

Reformist feminism aligns most closely with first-wave struggles. It focuses on the unequal division of labour in the household and workplace, the devaluation of women's work, and women's underrepresentation in institutions such as politics, law, and science. Reformist feminists operate within existing social categories, demanding equal treatment and access. Their aim is to correct testimonial injustice by ensuring that women's voices and contributions are taken as seriously as men's. For instance, campaigns for equal pay, anti-discrimination laws, and women's representation in parliament are reformist strategies: they do not question the categories of "male" and "female" but insist on fairness within them.

Resistant feminism reflects the structural critique of second-wave feminism. It identifies patriarchy as a system of interlocking oppressions that exploit women's sexuality, labour, and emotions. Rather than simply demanding equality, resistant feminists argue that patriarchal power is embedded in institutions, discourses, and practices that must be fundamentally challenged. Here, the focus is on exposing hermeneutical injustice: the ways patriarchal frameworks make women's oppression invisible or unintelligible. By naming sexual harassment, marital rape, or the "second shift" of domestic labour, resistant feminists created new interpretive tools that allowed women to make sense of their oppression and demand recognition.

Rebellious feminism, emerging most forcefully in the third wave, goes further still. It challenges the very categories through which gender inequality is constructed. For rebellious feminists, inequality is not just sustained by patriarchal structures but by the very binary logic of male/female, heterosexual/homosexual, public/private. By destabilising these categories, rebellious feminists confront the epistemic foundations of inequality itself. Queer theory, postmodern feminism, and decolonial critiques exemplify this approach: they insist that there are multiple genders, sexualities, and epistemes, and that insisting on singular categories perpetuates injustice. Rebellious feminism therefore seeks epistemic recognition not just for women but for all marginalised identities whose experiences are erased by binary or Eurocentric frameworks.

Together, Lorber's three theories map onto the feminist waves but also transcend them. They show how feminism is not a linear progression but a set of overlapping strategies to confront epistemic injustice: reformist feminists seek equal recognition within categories, resistant feminists expose the structures that silence women's experiences, and rebellious feminists challenge the categories themselves.

## FEMINIST THEORIES AND DEVELOPMENT PARADIGMS

The feminist struggle for epistemic recognition has not been confined to the political sphere. It has also shaped, and been shaped by, international development. Development discourses are one of the most revealing sites for studying how feminist ideas of reform, resistance, and rebellion have been taken up, adapted, or resisted in practice.

**Reformist approaches** in feminism parallel the WID paradigm that dominated development thinking in the 1970s and 1980s. Like reformist feminism, WID did not question the overall structure of development but sought to ensure that women were included within it. The assumption was that women's underdevelopment resulted from their exclusion from education, paid labour, credit, and political participation, and that development outcomes could be improved by integrating women into existing projects. The focus here is on correcting testimonial injustice: making women's voices count in



agricultural projects, literacy programmes, and microcredit schemes. However, critics argued that WID left intact the patriarchal structures of development, treating women as an “add-on” rather than transforming the system that had marginalised them in the first place (Moser, 1993).

**Resistant feminist theories**, which locate oppression in systemic patriarchy, resonate with the GAD paradigm that emerged in the 1980s and 1990s. GAD shifted the focus from “women” as a category to “gender relations” as a system of power shaping all aspects of development. It exposed the ways institutions, states, and development agencies perpetuate inequality by naturalising women’s unpaid care work, ignoring reproductive rights, or failing to address violence against women. In this sense, GAD challenged hermeneutical injustice: it provided women with the conceptual tools to reinterpret their experiences of marginalisation not as private misfortunes but as products of structural gender relations. For example, the recognition of the “feminisation of poverty” reframed women’s economic disadvantage as a systemic issue linked to both global economic restructuring and local patriarchal practices.

Rebellious feminism finds its closest **parallel in postcolonial and decolonial approaches** to development, which reject the Eurocentric and binary frameworks that underpin mainstream development thinking. These approaches question not just women’s exclusion but the very epistemic foundations of development: the binary of developed/underdeveloped, the universalisation of Western models of progress, and the privileging of economic growth as the measure of well-being. Feminists in the Global South, Indigenous scholars, and decolonial theorists argue that development often imposes alien categories and silences local knowledge systems. Here, epistemic injustice is not simply about women being unheard but about entire communities being denied recognition as knowers. As Süleymanoğlu-Kürüm and Gençkal Eroler (2023) demonstrate, alternative modernities are often dismissed as “backward” or “irrational,” perpetuating global hermeneutical injustice. Rebellious feminism aligns with these critiques by demanding epistemic pluriversality — the recognition of multiple ways of knowing, organising, and living that are erased by dominant development paradigms.

By mapping Lorber’s reformist, resistant, and rebellious feminisms onto WID, GAD, and postcolonial/decolonial paradigms, we see that feminist theory is not an abstract exercise. It provides the intellectual resources to analyse how development itself can perpetuate or resist epistemic injustice. From the reformist insistence on women’s inclusion, to the resistant exposure of structural inequality, to the rebellious deconstruction of binary categories and Eurocentrism, feminist theories continue to shape the way we understand — and contest — the link between gender and development.

## VIDEO RESOURCES

To complement this week’s lecture, the following videos provide accessible insights into the concepts we have discussed. Each resource is linked to the course objectives, helping you consolidate your understanding of epistemic injustice, feminist waves, and their relationship to development.

### Epistemic Injustice

This short explainer introduces Miranda Fricker’s concept of epistemic injustice and illustrates how individuals can be silenced or misinterpreted due to credibility deficits and hermeneutical gaps. Watching this will help you connect the theoretical discussion from class to everyday contexts, reinforcing the idea that feminist movements are also struggles against epistemic silencing.

### Epistemic injustice in healthcare

By applying epistemic injustice to the field of healthcare, this video demonstrates how women’s testimony has historically been disregarded in medical settings, leading to underdiagnosis, mistreatment, or dismissal of pain. It directly supports our course objective of recognising how



epistemic injustice manifests across different sectors of development, from health to education, and why feminist critiques remain vital.

### History of Feminism in 15 Minutes

This video provides a concise overview of the key milestones in feminist history, from the suffragette movement to contemporary struggles for intersectional recognition. It complements our discussion of feminist waves as epistemic struggles for recognition, showing how activism has both challenged and reshaped dominant knowledge structures.

### Every Wave of Feminism Explained in 3 Minutes

This rapid but clear presentation outlines the defining features of the first, second, and third waves of feminism. It is especially useful for consolidating the links we drew in class between Lorber's reformist, resistant, and rebellious feminisms and development paradigms such as WID, GAD, and postcolonial/decolonial approaches.

## STUDY QUESTIONS

**1.** How does epistemic injustice operate in everyday development contexts?  
Think of examples such as international aid projects, policy-making, or grassroots activism. Whose voices are amplified, whose are sidelined, and why?

**2.** How do feminist “waves” illustrate struggles for epistemic recognition?  
Consider how different waves of feminism (liberal, radical, intersectional, decolonial) have fought not only for political and legal rights but also for credibility and authority as knowledge producers.

**3.** What strategies of epistemic resistance can we identify in global politics?  
Explore how marginalised groups resist epistemic erasure — through storytelling, protest, scholarship, or alternative institutions — and what this reveals about the link between knowledge and power.



# UNDERSTANDING DEVELOPMENT

In the first two chapters of this book, we examined how gender inequalities are socially constructed and how epistemic injustice limits whose voices are heard and valued in global debates. These discussions highlighted that development is never just a neutral or technical process but one deeply shaped by power, culture, and knowledge. If we want to understand why gender matters in development, we must first grapple with the foundational question: what do we mean by development in the first place?



## Guiding Questions

### *Guiding Questions*

1. When you hear the word “development,” what comes to mind first?

Is it wealth, infrastructure, education, healthcare, freedom, gender equality — or something else entirely?

2. Can a country be considered “developed” if it is wealthy but lacks basic human rights and gender equality?

Think of examples: do high GDP numbers always align with a better quality of life for all citizens?

3. Whose perspectives shape how we define and measure development?

Are the dominant definitions (e.g., GDP, global rankings) neutral, or do they reflect certain cultural, political, or gendered assumptions?

At first glance, this may seem straightforward. Development is often imagined as the process of improving people’s lives—providing food, shelter, healthcare, education, and opportunities for prosperity. But the moment we try to define what counts as “improvement” or “progress,” disagreements emerge. Is development best captured by a rising GDP? By higher literacy rates? By longer life expectancy? By the expansion of freedoms and rights? Each answer reflects not only a different indicator but also a different vision of what a good life entails.

This ambiguity makes the concept of development both powerful and contested. It is powerful because it shapes the agendas of governments, international organizations, and NGOs. It influences how aid money is allocated, how success is measured, and which countries are seen as “advanced” or “backward.” But it is also contested because every definition of development privileges certain values, voices, and ways of life over others. For example, an economic definition may privilege growth and markets while neglecting care work, cultural practices, or political freedoms.

Feminist scholars have been among the most critical voices in this debate. They remind us that definitions of development are never gender-neutral: they are shaped by assumptions about whose labor counts, whose needs are prioritized, and whose contributions remain invisible. From the early critiques of “Women in Development” approaches to contemporary debates on decolonial feminist epistemologies, these interventions have consistently highlighted that the way we define development has profound consequences for gender equality.

This chapter therefore asks: What is development? Our task is not to provide a single definitive answer but to unpack the assumptions, measures, and power relations embedded in different definitions. By doing so, we can better understand how gender—and the feminist critiques we have been studying—transform the very meaning of development itself.

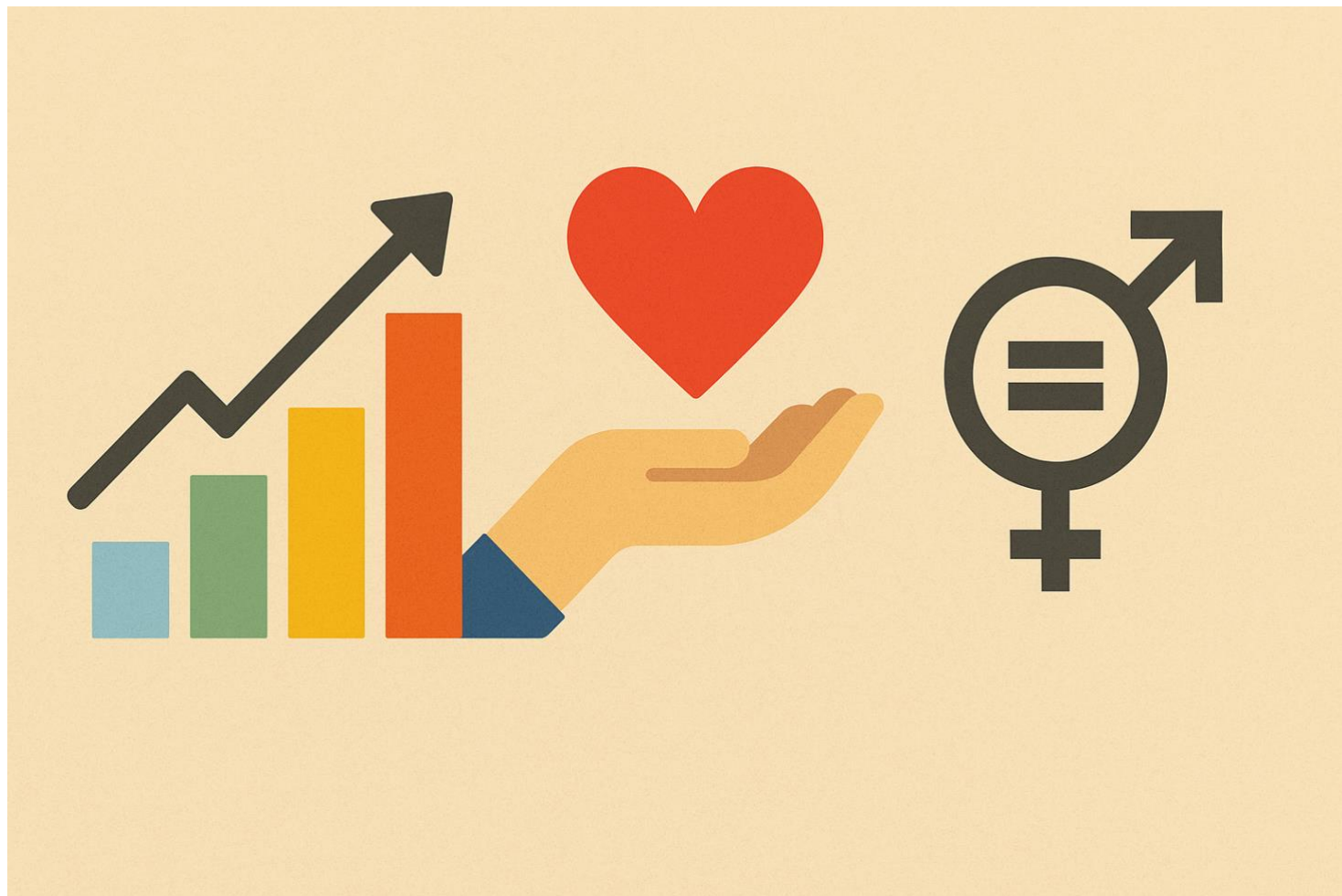
Do you think economic development automatically brings social, cultural, and political development? Why or why not?



PROMPT

*Do you think economic development automatically brings social, cultural, and political development? Why or why not?*

## THEORIES OF INTERNATIONAL DEVELOPMENT



One of the most enduring and dominant ways of defining development has been through economic growth, measured by **Gross Domestic Product (GDP)** per capita. For much of the twentieth century, the logic was straightforward: the more goods and services a country produces, the richer it becomes; and the richer it becomes, the more developed it must be. This approach underpins many of the global rankings of prosperity and progress, and it continues to dominate international discourse despite decades of criticism.

GDP per capita is calculated by dividing the total value of goods and services produced within a country by its population. This creates a single, seemingly objective number that allows for easy comparisons across countries. Rankings such as those that place Luxembourg, Ireland, Switzerland, and Singapore at the top of the list present development as dazzling figures of wealth and productivity. Yet, as soon as we probe beneath the surface, the limitations of GDP become apparent.

As we move forward, keep this tension in mind. Theories of international development begin with **GDP-based approach to international development**, but GDP per capita assumes a level of distribution that rarely exists and ignores the deeper questions of what people can actually do and be with their resources. To illustrate the dominance of this measure, consider the rankings of the so-called richest countries in the world by GDP per capita: Luxembourg leads with over 143,000 USD, followed by Ireland, Switzerland, Norway, Denmark, the United States, and Singapore. These figures dazzle, but they do not tell us which countries offer their citizens the most justice, equality, or meaningful freedoms.

By placing gender into this conversation, we see how vital it is to expand our definitions. Development is not just about how much wealth a society produces but about who benefits, who is



excluded, and what possibilities for life and dignity are opened—or foreclosed—by that wealth. This is where feminist critiques of development step in, urging us to rethink progress itself.

When we talk about development, GDP often comes up as the most common indicator. But here is the key question we need to ask: does GDP really tell us about the welfare of citizens? Think about the case of the UAE. On paper, the country looks extremely wealthy with a GDP per capita of over 77,000 dollars. But when we dig deeper, the reality is far more complex: only about 10% of the population actually controls this wealth, while almost 40% of the people live on less than 10 dollars a day. What we see here is the problem of income inequality. GDP gives us a number, but it does not reveal how resources are distributed, who benefits, and who is excluded. So, can we equate high GDP with human development? Clearly not.

Moreover, GDP treats all economic activity as equal. The production of weapons contributes to GDP just as much as the building of schools or hospitals. Meanwhile, vast areas of human activity — particularly unpaid domestic and care work, disproportionately carried out by women — are excluded altogether from GDP calculations. Feminist economists such as Diane Elson and Marilyn Waring have long argued that this exclusion is not accidental but reflects a gendered devaluation of work associated with women. By ignoring unpaid care work, GDP not only misrepresents the real structure of economies but also erases the central role that women play in sustaining households and communities.

This is why feminist critiques urge us to rethink GDP as not just an inadequate measure, but as an epistemic tool that actively reproduces inequality. It shapes what we see and what we ignore, whose labour is recognized, and whose is silenced. By equating development with GDP, policymakers risk designing policies that prioritize abstract growth over human dignity, rights, and gender equality.

This is precisely why alternative frameworks have emerged. The United Nations Development Programme (UNDP) introduced the concept of human development to move beyond GDP. According to the UNDP, development should be understood as the expansion of people's choices and freedoms, and they measure this through three core dimensions: living a long and healthy life, having access to knowledge, and enjoying a decent standard of living or wealth. These became the foundations of the Human Development Index (HDI). But this definition immediately raises further questions. Do health, education, and wealth fully capture what it means to live a flourishing life? Or are we missing dimensions such as environmental sustainability, happiness, cultural participation, or gender equality? Here I want you to pause and reflect: if you were to design your own Human Development Index, what would you add to these measures?

Another approach has been the **resource-based approach**, which focuses on how resources are distributed within a society. On the surface, equal distribution seems like the fairest option. But equal distribution is not always just distribution. Consider this: pregnant women and children need more protein than adult men. People with disabilities require additional resources, such as wheelchairs, care workers, or accessibility infrastructure, to participate in social life on an equal footing. If we distribute resources equally, without considering these differences, we end up perpetuating inequality rather than resolving it. True justice requires us to think not only about how much people get, but also about what they need in order to live a dignified life.

This debate has shaped different policies worldwide. In South Africa during apartheid, for example, white students had far greater access to universities, while black students were systematically excluded. In response, the government later introduced scholarships specifically for the black population to correct structural inequalities. In the United States, some universities implemented quotas for black students to diversify access to education, while in Oxford, debates arose over whether to prioritize inclusivity or academic elitism. In Turkey, programs were introduced to encourage girls' schooling by offering families additional payments if they sent their daughters to school. These examples highlight the political and cultural battles over how resources should be distributed and to whom.

As we reflect on these debates, the connection to gender and development becomes clear. Traditional economic theories that focus on GDP or even on aggregated human development scores often overlook the structural barriers faced by women and marginalized groups. Gender inequality in



access to resources, education, employment, and political participation means that women and LGBTQI+ people do not benefit equally from economic growth. Development, therefore, cannot be reduced to abstract numbers. It is about whose lives improve, whose voices are heard, and whose needs are met.

So, the key takeaway is this: development is not only about the wealth of nations, but about the distribution of opportunities, rights, and resources. And unless we put gender at the center of this conversation, we risk reproducing the very inequalities we seek to eliminate.



## VIDEO RESOURCES

### Real GDP Per Capita and the Standard of Living.

This explainer introduces Real GDP per capita as a common measure of economic performance and living standards. While useful, it highlights the limitations of GDP in capturing inequalities, unpaid labour, and non-material aspects of life. For this course, it serves as a contrast to the Capability Approach, showing why resource- or income-based measures alone cannot account for gendered differences in development.

### Puzzle of Growth: Rich Countries and Poor Countries.

This video examines why some nations are wealthy while others remain poor, stressing institutions such as secure property rights. In the context of gender and development, it raises critical questions about women's and men's unequal access to property, inheritance, and credit. It encourages students to think about how unequal property rights hinder women's capabilities and development outcomes.

### Human Development Report 2019 – Animated Explainer.

This animation presents the UNDP's Human Development Index and its focus on health, education, and income. It demonstrates the shift from resource-based to people-centred measures of development. For the course, it links directly to Sen and Nussbaum's Capability Approach and provides empirical illustrations of gender inequalities across multiple dimensions of human development.

### Justice: What's The Right Thing To Do? Episode 01 "The Moral Side of Murder."

Michael Sandel introduces moral reasoning through utilitarian dilemmas such as the trolley problem and the Dudley & Stephens case. The first 30 minutes clarify the strengths and limits of utilitarianism in evaluating justice. For students, it offers an accessible entry point to moral philosophy and provides a foundation for comparing utilitarianism with human rights and capability approaches in the context of gender and development.

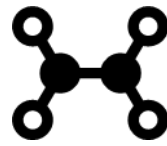
## STUDY QUESTIONS

If GDP per capita tells us little about how wealth is distributed, why do you think it continues to dominate international debates about development? Who benefits from this narrow definition?

1. The Human Development Index (HDI) adds health and education to income. But do these three dimensions fully capture what it means to live a flourishing life? What might be missing from this measure, especially from a feminist perspective?

2. How can resource distribution be made equitable rather than simply equal? Think about examples such as girls' education programs, disability rights, or affirmative action. What challenges arise when designing such policies?





## UTILITARIANISM, HUMAN RIGHTS, AND THE CAPABILITIES APPROACH

Having explored how knowledge, power, and gender intersect through feminist debates on epistemic injustice, we now shift our focus to the broader theoretical frameworks that have historically shaped international development thinking. These frameworks — utilitarianism, human rights, and the capabilities approach — are not abstract philosophical debates. They inform how policymakers design development agendas, how international organisations measure progress, and how justice itself is defined. Crucially, they also influence whether gender equality is seen as central or peripheral to development.



Utilitarianism



Human Rights



Capabilities Approach

Utilitarianism has been one of the most dominant approaches, particularly within economics. At its heart lies a simple but powerful principle: the maximisation of overall happiness or utility. In development practice, this principle has underpinned cost-benefit analyses, economic growth models, and policy prescriptions geared toward “the greatest good for the greatest number.” Yet feminist scholars have long critiqued utilitarianism for masking injustice in the name of aggregate welfare. Whose happiness counts? Who bears the invisible costs? The unpaid care work disproportionately carried by women, for example, is often treated as an externality, excluded from utilitarian calculations even as it sustains whole economies.

Human rights frameworks emerged in part to address these blind spots. Rooted in the aftermath of World War II and codified in the Universal Declaration of Human Rights (1948), this perspective insists that development is not only about improving welfare but also about protecting and advancing the dignity of all individuals. From education and health to freedom from violence and discrimination, rights-based approaches foreground entitlements that cannot be overridden by calculations of utility. Feminist movements have powerfully mobilised this language — the declaration that “women’s rights

are human rights” at the 1995 Beijing Conference remains a landmark moment. At the same time, critics have pointed out that rights-based discourses often reproduce Eurocentric assumptions about family, autonomy, and individuality, raising questions about their universality.

The capabilities approach, pioneered by Amartya Sen (1999) and later developed by Martha Nussbaum (2000), offers a different lens. Instead of focusing on aggregate happiness or abstract rights, it asks: what are people actually able to do and to be? Development, in this view, is about expanding real freedoms and opportunities — the substantive capabilities that allow individuals to live lives they have reason to value. The approach resonates strongly with feminist concerns. Two people may enjoy the same income or formal rights, but gender norms, health inequalities, or structural discrimination can profoundly limit the opportunities of one compared to the other. By centring agency and diversity, the capabilities approach highlights the lived constraints women face, even within systems that claim to guarantee equality.

### ***Guiding Questions***

- 1.** How do competing theories conceptualise well-being, justice, and equality?
- 2.** Whose voices, knowledge, and needs are included — and whose are silenced — in each framework?
- 3.** Do these approaches challenge or perpetuate the epistemic injustices we explored in the previous chapter?

This chapter will examine utilitarianism, human rights, and the capabilities approach not as neutral theories but as lenses that actively shape the politics of development. By situating them in relation to feminist critique, we will uncover both their possibilities and their limitations for advancing gender equality in global development.



## **Guiding Questions**

### **UTILITARIANISM**

We begin by exploring utilitarianism, one of the most influential ethical theories in philosophy, economics, and international development. At its core, utilitarianism argues that the moral worth of an action is determined by its outcomes or consequences. In other words, what makes an action right or wrong is not the intention behind it but whether it produces the greatest amount of happiness or well-being for the greatest number of people.

This approach is called consequentialist or teleological because it evaluates morality based on the end results rather than the means. The classic examples often used to illustrate this are the “trolley problem” and the “fat man dilemma.” In the trolley case, you are asked whether it is morally acceptable to divert a runaway trolley so that it kills one person instead of five. The utilitarian position is clear: one death is better than five, so the morally right action is to sacrifice the one for the many. In the fat man variation, however, the choice is to push a large man off a bridge to stop the trolley, saving five others. Here the dilemma sharpens, since the utilitarian calculation is the same — one death versus five — but the action feels more morally problematic. These thought experiments reveal both the appeal and the difficulty of utilitarian reasoning.

The theory was developed in the late eighteenth and early nineteenth centuries by Jeremy Bentham, who proposed a very systematic way of assessing actions. For Bentham, the right action is that which maximises pleasure and minimises pain. He even suggested that pleasure and pain could be measured through what he called the hedonic calculus, a formula that considered factors such as intensity, duration, certainty, and extent. For example, the pleasure of eating a meal might score

differently from the pleasure of education, but in principle both could be assessed and compared. Bentham's vision was radical because it treated all pleasures as commensurable and all individuals' happiness as equally valuable. It was, in many ways, a profoundly democratic idea: the happiness of a poor woman counted as much as that of a wealthy man.

*Does a policy that increases overall happiness but leaves some groups worse off—such as women carrying disproportionate unpaid care work—still count as just development?*



Yet, Bentham's utilitarianism was also criticised for its reductionism. John Stuart Mill, who refined the theory in the mid-nineteenth century, argued that not all pleasures are of equal value. Higher pleasures — such as intellectual fulfilment, artistic appreciation, or moral development — should count for more than lower pleasures like eating or drinking. Mill's version therefore introduced a qualitative distinction that Bentham's calculus lacked. Still, both versions share the central principle: moral reasoning must look to the overall consequences of actions and aim to maximise well-being.

From these foundations, utilitarianism profoundly influenced development thinking. Economic models of cost-benefit analysis, for example, reflect utilitarian logic: policymakers seek to design interventions that produce the greatest overall benefit at the lowest cost. Public health campaigns, poverty alleviation projects, and even climate change policies often employ utilitarian reasoning when weighing trade-offs between different groups.

However, utilitarianism is not without problems. One issue is that it can sacrifice the rights of individuals for the sake of the majority. For example, if enslaving a minority were to increase the overall happiness of a majority, utilitarianism might, in principle, justify it. This is why critics like Bernard Williams (1973) have argued that utilitarianism undermines the integrity of individuals by forcing them to prioritise aggregate outcomes over personal commitments or moral duties. Williams's famous critique of negative responsibility illustrates this: if I can prevent harm by doing something morally abhorrent, utilitarianism might demand that I do it, even if it violates my deepest values.

Another problem is that happiness is difficult to measure and compare. Bentham's hedonic calculus assumes that pleasure and pain can be quantified and aggregated, but in reality, experiences are diverse, culturally situated, and often incommensurable. Consider the example of a woman living in poverty, without formal education, and under the authority of her father. If asked whether she is happy, she may answer "yes" simply because she has never encountered an alternative life. Does her reported happiness mean that her quality of life is acceptable? Utilitarianism would say yes, since her subjective contentment is counted. Yet feminist and human rights critiques would argue that her lack of choice and autonomy reflect a profound injustice that cannot be captured by utilitarian measures of happiness.

This is where utilitarianism runs into significant challenges in development and gender contexts. By focusing on aggregate welfare, it often ignores distributional inequalities and power relations. Women's unpaid labour in households, for instance, has historically been treated as "outside" economic value because it does not directly maximise measurable output. Similarly, practices like child marriage or restrictions on women's mobility might be tolerated if they produce family or community stability — even though they undermine women's autonomy and rights.

Despite these limitations, utilitarianism also has strengths. It directs attention to the consequences of policies and actions, reminding us that intentions alone are not enough. It challenges us to think about the broader impact of development projects and to consider how to achieve the greatest good with limited resources. But as we will see in the next sections, alternatives like the human



rights framework and the capabilities approach arose precisely because utilitarianism could not adequately account for justice, equality, and recognition.

## HUMAN RIGHTS APPROACH

After engaging with utilitarianism, with its emphasis on maximizing overall welfare and accepting trade-offs that may sacrifice the rights of a few for the benefit of many, we now turn to the human rights approach. This perspective shifts the emphasis from aggregate happiness to the recognition of every individual as a rights-holder whose dignity cannot be reduced to a numerical calculation of pleasure and pain. The human rights approach emerged out of the post-Second World War order, crystallized in the 1948 Universal Declaration of Human Rights and later codified through binding treaties such as the International Covenants and the Convention on the Elimination of All Forms of Discrimination against Women. For gender and development, it was particularly transformative when the global community explicitly affirmed that women's rights are human rights, and when violence against women, including practices long considered "private," such as domestic abuse and marital rape, was recognized as a violation requiring state accountability.

This shift is crucial for development debates. While utilitarian reasoning may justify interventions that maximize total well-being, even if some groups are marginalized in the process, the human rights approach establishes a baseline of non-negotiable entitlements. No amount of aggregate benefit can justify torture, forced marriage, denial of reproductive healthcare, or systemic discrimination. Rights, by their nature, cannot be traded away for the happiness of the majority. This introduces a qualitatively different orientation: states and institutions are not simply encouraged to improve welfare but are obligated to respect, protect, and fulfil human rights. Respect requires that they refrain from violating rights directly; protection requires them to prevent abuses by third parties; and fulfilment requires positive action to ensure that rights can be realized in practice.

The significance of this for gender equality in development becomes clear when we ask whether laws and policies are truly empowering women, girls, and other marginalized identities, or whether they merely improve average outcomes while leaving structural inequalities untouched. For instance, a government might report rising literacy rates overall while ignoring the fact that girls in rural areas remain excluded due to child marriage or inadequate school facilities. A human rights perspective insists that such exclusions are not incidental but fundamental failures of accountability. This is why participation, accountability, non-discrimination, empowerment, and legality are identified as the core principles of a rights-based approach. They do not only describe values but also provide a framework for assessing institutions and policies: do women have a genuine say in decisions that affect them, are governments accountable for femicides, are discriminatory practices in leadership appointments addressed, are rights legally enforceable and supported by remedies?

Unlike utilitarianism, which may be satisfied with outcomes that maximize happiness overall, the human rights approach asks whether individuals actually have enforceable entitlements and whether there are mechanisms to claim and defend them. This is what makes it both attractive and challenging in the development context. It resists treating people as passive beneficiaries of aid or policy and instead casts them as active rights-holders who can demand recognition and accountability. In this sense, it also resonates with our earlier discussions of epistemic injustice and feminist struggles: just as women have historically fought to be recognized as knowers whose experiences count as evidence, so too the human rights approach insists that their lives, bodies, and choices must be protected by enforceable standards.

Building on the foundations of the human rights approach, we can now move into its core principles. These principles are not abstract ideals but operational commitments that give meaning to rights in practice. Without them, human rights risk becoming rhetorical promises rather than enforceable entitlements. Each principle sheds light on a different aspect of what it means to respect, protect, and fulfil rights, especially when applied to questions of gender and development.

**Participation** lies at the heart of the human rights framework. Rights cannot be realized if people are excluded from the decisions that shape their lives. Participation means more than being formally

present; it must be active, free, meaningful, and inclusive. It requires that information be accessible and communicated in forms and languages that people can understand, ensuring that barriers of literacy, language, or social status do not silence voices. For women, participation has often been denied through both structural and cultural mechanisms: patriarchal norms have excluded them from political assemblies, religious councils, and even community meetings, while legal systems in many parts of the world have historically treated them as dependents rather than autonomous citizens. The Istanbul Convention, which addresses violence against women and domestic violence, exemplifies the importance of participation: women's organizations were directly involved in drafting the treaty and continue to play a critical role in monitoring its implementation. Without such involvement, the Convention would risk becoming a technocratic exercise rather than a lived instrument of empowerment. Participation thus transforms women from passive recipients of rights to active shapers of their own futures.

Closely connected to participation is **accountability**. Rights only have meaning if duty-bearers can be held to account for their failure to respect, protect, and fulfil them. Accountability requires mechanisms that monitor compliance with human rights standards, provide remedies when violations occur, and impose consequences on those who fail in their responsibilities. In practice, this often involves independent courts, ombudspersons, human rights commissions, or international treaty bodies. Yet accountability also requires political will and social pressure. In contexts where femicides are rising, for instance, the question is not only whether perpetrators are prosecuted but also whether governments are fulfilling their duty to prevent violence in the first place. Are there shelters, hotlines, and support services? Are police adequately trained and held responsible when they dismiss complaints of abuse? A rights-based approach insists that accountability cannot be outsourced to individuals alone; it is a structural obligation of states and institutions.

Another cornerstone is **non-discrimination and equality**. The human rights approach affirms that rights must be guaranteed to all, without distinction of any kind, such as sex, race, religion, or social origin. Yet guaranteeing formal equality is not enough. Development studies have shown repeatedly that groups already marginalized—such as women in rural areas, ethnic minorities, or LGBTQ+ individuals—face the greatest barriers to realizing their rights. A rights-based approach therefore requires not only prohibiting discrimination but actively prioritizing those in the most vulnerable situations. For example, while constitutions may affirm equal rights to education, discriminatory practices in leadership appointments or in cultural expectations can continue to limit women's access to decision-making positions. Equality here is substantive, not merely formal: it asks whether the conditions exist for women and men alike to enjoy their rights on equal terms.

The principle of **empowerment** further deepens this vision. To enjoy rights, individuals must know them, claim them, and be supported in doing so. Empowerment is both a process and an outcome: it involves building capacities, raising awareness, and providing the resources that allow people to act as agents of change. For women, empowerment means challenging not only legal barriers but also social norms that naturalize inequality. Imagine, for instance, a poor girl in Eastern Turkey deprived of education or married off as a child. A human rights-based approach insists that she is not a passive victim but a rights-holder who deserves support to know and claim her entitlements. Citizenship training, community education, and grassroots organizing all become tools for empowerment, linking the abstract language of rights to concrete transformations in daily life.

Finally, the principle of **legality** ensures that rights are not left to the goodwill of states but are anchored in law. Legal recognition is what makes rights enforceable and binding. When rights are codified in constitutions, laws, or international treaties, individuals and communities can demand their fulfilment in courts and other forums. However, legality also requires effective enforcement. It is not enough to declare that torture or marital rape is prohibited; the legal system must provide remedies, ensure prosecution, and dismantle the impunity that often surrounds such violations. In many countries, the recognition of marital rape as a crime has been a hard-won victory, but enforcement remains weak. A rights-based approach thus requires both legal recognition and the institutional capacity to make rights real in practice.

Taken together, these principles redefine development from a process of delivering aid or maximizing welfare to one of ensuring justice, dignity, and agency. They echo feminist critiques of earlier models of development, which often treated women as beneficiaries rather than as actors with voice and agency. By emphasizing participation, accountability, equality, empowerment, and legality, the human rights approach aligns with feminist struggles against epistemic injustice, situating women and marginalized groups as subjects of knowledge, law, and politics.

*Are human rights truly universal, or do they risk imposing Eurocentric assumptions about autonomy and family life on non-Western societies?*



### ***Criticisms of Human Rights Approach***

Although the human rights approach provides a powerful corrective to utilitarian reasoning by centring dignity and non-negotiable entitlements, it is not without its limitations. In practice, the approach has often been criticized for remaining too legalistic, rhetorical, or abstract, and for failing to address the structural conditions that make rights unrealizable for many. This means that while the language of rights has become globally dominant, the lived experience of rights-holders can remain precarious.

One recurring criticism is that governments frequently grant rights in constitutions or treaties but fail to operationalize them. Simply declaring that citizens have the right to protest, for example, does little if police use violence against demonstrators and there are no effective remedies. In such cases, rights exist on paper but not in practice. The critique here is that the human rights approach, when reduced to legal codification, can ignore the political conditions that determine whether rights are actually protected and respected.

Another concern lies in the tendency of many states to focus on formal entitlements rather than substantive outcomes. It is one thing to guarantee equal access to education in law; it is another to ensure that girls in rural or marginalized communities are actually able to attend school. Critics argue that the rights-based approach has often been too focused on “ontologically individualistic” solutions, assuming that once rights are legally recognized, individuals will automatically be able to claim them. Yet this perspective fails to consider social, cultural, and economic factors—such as patriarchal family structures, poverty, or discriminatory institutions—that systematically prevent people from exercising their rights. As Tikly and Barrett (2011) note, this blind spot makes the human rights approach insufficient for fostering sustainable and transformative change.

A further critique relates to the emphasis on “negative freedoms,” that is, the absence of external obstacles, barriers, or interference. Negative freedom protects individuals against violations, such as violence against women, arbitrary arrest, or censorship. But this emphasis alone can be inadequate, because it overlooks “positive freedom,” which requires the presence of enabling conditions that allow people to pursue their life goals. Positive liberty entails having access to education, healthcare, political participation, and the social recognition necessary to live a meaningful life. While negative liberty is often attributed to individuals, positive liberty is deeply relational and frequently depends on collective structures such as democratic institutions, welfare systems, or women’s movements. If the human rights approach focuses only on preventing violations without ensuring enabling conditions, it risks leaving inequalities intact.

Another problem is the tendency of rights discourse to focus on legalistic remedies rather than political mobilization. Rights can be powerful tools when used by social movements to hold states accountable, but without collective action and structural reform, they can remain symbolic. For example, many countries have ratified the Convention on the Elimination of All Forms of Discrimination



against Women (CEDAW), yet enforcement mechanisms are weak, and states routinely enter reservations that limit its impact. Similarly, while international law recognizes reproductive rights, domestic politics often block women's access to safe abortion or contraception. Critics thus caution against an overreliance on rights as the sole framework for justice.

Finally, there is the question of universality and context. While the language of rights claims to be universal, it has also been accused of carrying a Eurocentric imprint that reflects Western liberal traditions more than local realities. This raises tensions in development contexts, where global rights frameworks sometimes clash with cultural practices or fail to resonate with local communities. Feminist and decolonial scholars have argued that a rigid application of universal rights can silence alternative ways of conceptualizing justice and well-being, reinforcing rather than challenging epistemic hierarchies.

Despite these critiques, it is important not to discard the human rights approach altogether. Rather, the challenge is to integrate it with other frameworks that account for structural inequalities, collective struggles, and local epistemologies. When combined with feminist and decolonial insights, the rights-based approach can be a powerful tool for exposing injustices and demanding accountability while remaining sensitive to context and diversity.

## CAPABILITIES APPROACH

After discussing the utilitarian and human rights-based approaches, we now turn to the Capability Approach, which offers a different perspective on equality, development, and justice. This approach was primarily developed by the economist and **Nobel Laureate Amartya Sen** in the late twentieth century, with further elaboration by the philosopher Martha Nussbaum. It emerged in response to what was often described as the “crisis of development” in the 1970s and 1980s, when conventional measures of progress—such as GDP growth or aggregate resource levels—were increasingly criticized for failing to capture what actually mattered for people's lives.

Sen's work was situated against two dominant traditions of thinking about social justice and equality: resource-based approaches and utility-based approaches. The resource-based approach focused on the distribution of material goods, such as income or wealth, while utility-based approaches emphasized subjective satisfaction or happiness. Sen argued that both had serious limitations. Equal distribution of resources did not guarantee equal ability to use them, and maximizing utility risked ignoring structural inequalities, adaptive preferences, and situations where people's happiness was shaped by oppression or deprivation.

This led Sen to pose a deceptively simple but profoundly important question: “Equality of what?” If we care about equality, what is it that we are trying to equalize? His answer shifted attention away from resources or subjective states, toward people's real freedoms to achieve the lives they have reason to value. The Capability Approach is thus best understood as both a theoretical and evaluative framework for thinking about equality and development. It asks us not simply how much income people have or how happy they say they are, but whether they are actually capable of doing and being the things that matter to them—whether they can be healthy, educated, politically active, respected, and free.

At the heart of this framework is the distinction between **functionings** and **capabilities**. Functionings refer to the various “doings and beings” that make up human life—such as being adequately nourished, being literate, taking part in community life, or being able to protest against injustice. Capabilities, on the other hand, are the real freedoms people have to achieve these functionings. For example, being able to protest requires not only the desire to do so, but also the political and social environment that makes it possible. The freedom to achieve a functioning is what Sen calls a capability.

Importantly, Sen emphasized that it is not just any functionings that matter, but the functionings that people themselves value. Here he distinguishes between well-being and agency. Well-being refers to aspects of life that directly benefit the individual—such as health, education, or income security. Agency, by contrast, reflects people's ability to pursue goals they value, even if those goals are not

directly about their own well-being. For instance, someone may risk their safety to participate in a political protest not for personal gain but because they value justice or solidarity. The Capability Approach thus acknowledges that human flourishing is not only about individual comfort but also about contributing to wider social purposes.

*If we say women “have the right” to participate in politics, does that mean they truly have the capability to do so? What additional freedoms, supports, or social recognitions are needed for this right to become a lived reality?*



To illustrate the importance of context and choice, Sen famously compared two people who are both starving. One person is starving because they are fasting for religious reasons, such as during Ramadan, while the other is starving because they cannot afford food. In both cases the functioning—being without food—appears the same, but the capability is entirely different. The fasting person has chosen this situation and could resume eating at any time, while the poor person lacks that choice. What matters is not the outcome alone but whether people had the real freedom to choose among valuable alternatives.

Building on this foundation, Sen and others developed a set of key arguments that clarify why the Capability Approach represents such a significant shift in how we think about development and equality. One of the central points is that capabilities do not necessarily coincide with either the possession of commodities or with happiness. It is tempting to assume that if people have enough goods or if they report being satisfied with their lives, then their well-being must be secure. Yet, as Sen and others argue, this assumption is misleading. What really matters is what people are able to do and to be with the resources available to them.

For example, a society might provide equal access to basic goods, such as bicycles. But whether an individual can convert a bicycle into actual mobility depends on far more than simply owning it. Someone with a disability, someone who never learned how to ride, or someone living in a city without safe roads may not be able to use the bicycle at all. This is why Sen insists that we must look beyond resources to the actual capabilities they enable. The focus of evaluation should not be on what people have, but on what they are really able to do.

Similarly, happiness cannot be the sole yardstick. People living under conditions of deprivation often adapt their expectations downward and may report being content despite severe disadvantage. Women who have been excluded from education, for instance, may express satisfaction with their lives not because they are flourishing, but because they have internalized restrictive social norms. A purely utility-based approach risks reinforcing such adaptive preferences rather than challenging the structures of inequality that produce them.

This perspective leads to another crucial insight: different people require different resources in order to achieve the same level of well-being. As Ingrid Robeyns puts it, “different people need different amounts and different kinds of goods to reach the same levels of well-being or advantage.” A pregnant woman, for example, may need more food and medical support than a man in order to achieve the same basic functioning of being healthy. Likewise, people with disabilities may require assistive technologies or specialized support services in order to secure the same capability of mobility or participation in education.

Because of this, the Capability Approach emphasizes **equality of outcomes** rather than equality of opportunities. The key concern is not whether everyone has access to the same resources, but whether everyone is genuinely enabled to achieve valuable functionings. Consider care provision in the workplace. If society simply guarantees women the legal right to work but does not provide childcare

services or maternity support, then women's real capability to participate in the labor force remains restricted. A focus on outcomes rather than formal opportunities allows us to address such structural barriers.

This argument was taken up very early by the disabilities movement, which found in Sen's framework a powerful way to highlight the shortcomings of resource-based equality. Treating everyone identically in terms of access to goods ignores the fact that people's needs and circumstances differ dramatically. For example, a person with impaired vision may require specialized equipment or support in order to achieve the same educational capabilities as their peers. The disability rights perspective underscores that justice must be about equality of capabilities rather than mere equality of resources.

In this sense, Sen's Capability Approach can be understood as a moral framework for evaluating social arrangements. It shifts the focus of justice to the extent of real freedom people enjoy in pursuing lives they have reason to value. The question is not whether people are theoretically entitled to rights or resources, but whether the actual conditions of their lives enable them to make meaningful choices. For instance, in the Turkish context, it is insufficient to note that women are legally entitled to work. What matters is whether childcare, workplace policies, and cultural expectations create conditions that enable or disable women's genuine participation in the labor force.

This is why Sen places emphasis on evaluating capabilities rather than functionings themselves. Functionings are the outcomes—whether someone works, protests, or eats. Capabilities are the freedoms and conditions that make those outcomes possible. The Capability Approach therefore invites us to ask not just whether rights exist in law, but whether individuals have the substantive freedoms required to exercise those rights in practice.

*How do personal, social, and environmental conversion factors shape women's ability to transform resources into real opportunities? For instance, what obstacles might prevent a woman from becoming Prime Minister, even when she formally has equal rights?*



One of the most innovative and practically useful aspects of the Capability Approach is the notion of conversion factors. Conversion factors help us understand why two individuals with the same resources may nonetheless have very different capabilities. They highlight the processes through which resources are—or are not—transformed into meaningful opportunities for functionings.

Sen explains that resources alone do not automatically translate into well-being. A bicycle, for example, is a resource. Whether that bicycle actually contributes to someone's capability for mobility depends on a range of personal, social, and environmental factors. These are called conversion factors because they affect the degree to which a person can convert resources into functionings.

Personal conversion factors are those internal to the individual. They include biological and physical characteristics such as metabolism, age, gender, disability, or physical condition, as well as acquired skills like literacy, cycling ability, or technological know-how. For example, a person with a physical disability who cannot ride a bicycle will not gain mobility from receiving one, unless complementary measures such as assistive devices are provided. Similarly, a woman who has not been given the chance to learn to read will not be able to convert access to books into the functioning of literacy. These factors remind us that people's bodies and capabilities differ, and justice requires that we take those differences into account.

Social conversion factors are shaped by the society and culture in which a person lives. These include social norms, power hierarchies, laws, policies, and cultural practices. They play a decisive role in determining whether resources can actually be used. Take again the example of the bicycle. In some societies, women may be legally or socially prohibited from riding bicycles, or they may face harassment if they do. In such contexts, even if women own bicycles, their real capability for mobility is severely

curtailed. Social norms around gender roles, caste systems, or racial discrimination can operate as invisible but powerful constraints, preventing individuals from converting resources into valued functionings.

Environmental conversion factors arise from the physical and built environment. They include geographical conditions like climate, natural disasters, or pollution, as well as infrastructural conditions such as the quality of roads, bridges, and public transport systems. A bicycle in a city with safe bike paths and low traffic enables far greater mobility than the same bicycle in a region with poor infrastructure or dangerous road conditions. Similarly, people living in areas prone to flooding or earthquakes face constraints that others do not, which shape the extent to which resources can be put to use.

These three types of conversion factors—personal, social, and environmental—demonstrate that the mere possession of resources is insufficient for ensuring equality or well-being. What matters is the interaction between resources and the conditions that enable their use. This is why Sen argues that evaluations of justice must focus on people's capabilities—their real freedoms to achieve functionings they value—rather than on formal rights or abstract distributions of goods.

The bicycle example illustrates this vividly. Imagine three individuals, each given a bicycle. One is healthy and trained to ride, living in a city with bike lanes: here, the bicycle becomes a functioning resource for mobility. Another is a disabled person who cannot ride: for them, the bicycle provides no mobility unless adapted. The third is a woman in a community where women are socially prohibited from cycling: her bicycle remains unused, not because of personal inability, but because of social constraints. In each case, the same resource—one bicycle—yields entirely different outcomes depending on the conversion factors at play.

Thus, the Capability Approach requires us to ask not only what resources people have but also what conditions exist that enable or restrict the use of those resources. This is particularly significant in contexts of gender inequality. A country may proclaim that women have equal access to education, employment, or political office, but if cultural expectations, inadequate childcare provision, or discriminatory laws restrict their capabilities, then formal equality translates into very little in practice.

When we apply the Capability Approach to the question of gender and politics, we move beyond simply asking whether women are formally entitled to vote or to stand for political office. Instead, we ask a deeper set of questions: what real capabilities do women have to engage in political life? Do they possess the substantive freedoms and enabling conditions that allow them not only to aspire to political participation but to achieve and sustain it?

The first prompt question is: what are the capabilities (freedoms and conditions) we need to focus on to ensure that women can be represented in parliament? Here, the Capability Approach encourages us to think about the wide set of interrelated conditions that enable political participation. Women may formally have the right to run for office, but do they have access to the education and training needed to build political careers? Are there mechanisms such as gender quotas that open pathways into legislatures? Is there affordable childcare that allows mothers to balance family and political responsibilities? And crucially, are women socially recognised as legitimate political actors, or do stereotypes and hostile environments undermine their ability to function as representatives? Capabilities such as freedom of speech, freedom of assembly, and safety from gender-based violence are indispensable here, because without them, the very possibility of participation collapses.

The second question is: what are the conversion factors that distract or obstruct women from becoming Prime Minister or President? This is where the distinction between personal, social, and environmental conversion factors becomes highly relevant. Personal conversion factors may include a lack of mentorship, networks, or financial resources that are necessary to mount leadership campaigns. Social conversion factors are even more decisive: cultural norms that portray politics as a "male domain," media narratives that scrutinise women's appearance or family status more than their policies, and institutional practices that make parliaments hostile workplaces for women. Environmental conversion factors might include logistical barriers such as unsafe transport to and from parliamentary sessions or unequal access to communication technologies that limit women's ability to reach



constituencies. Taken together, these conversion factors explain why so few women, despite having the legal right, actually reach the highest echelons of political power.

The third guiding question asks: what sort of policies and freedoms should be provided? From a capability perspective, the answer is that policies should be evaluated in terms of the substantive freedoms they create for women to achieve the political functionings they value. Quota systems, for example, are not merely about numerical representation: they are enabling devices that expand women's real opportunities to enter politics. Policies around work-life balance, parental leave, and accessible childcare expand women's capabilities by reducing the structural trade-offs that so often push them out of political careers. Freedom from harassment, both offline and online, is another critical dimension: if women in politics are subject to constant gender-based abuse, then their formal rights ring hollow, as their real freedoms are undermined.

Seen in this way, the Capability Approach highlights that the question is not whether women have the right to participate, but whether societies create the conditions under which women can genuinely convert that right into meaningful political functionings. It forces us to look at the lived realities of women in politics, rather than being satisfied with abstract legal guarantees.

This analysis also underscores an important normative point: equality of opportunity is not enough; what matters is equality of outcomes. Simply saying that women can stand for office does not ensure their substantive representation. What matters is whether women are actually able to run, to win, and to serve effectively. This is why Sen and Nussbaum stress that development and justice must be assessed by asking not just "what resources do people have?" but "what are people really able to do and to be?"



## VIDEO RESOURCES

To complement our discussion of utilitarianism, the human rights approach, and the capabilities approach, please watch the following videos. Together they will help you visualize and compare how different traditions of thought frame questions of justice, rights, and development.

[Justice: What's the Right Thing to Do? \(Episode 1, Michael Sandel\)](#) – Watch the first 11 minutes carefully, focusing on the trolley and fat man dilemmas, which illustrate the utilitarian perspective.

[Amartya Sen #1 on Capabilities](#) – A short introduction where Sen explains why freedom and real opportunities are at the heart of development.

[An Introduction to Amartya Sen's Development as Freedom \(Macat Analysis\)](#) – A clear overview of Sen's arguments about why development should expand human freedoms.

[A Human Rights Based Approach – PLANET](#) – An accessible presentation of how human rights principles (participation, accountability, non-discrimination, empowerment) guide development practice.

Please take notes as you watch and try to map how each approach addresses the central question of what counts as development and justice.

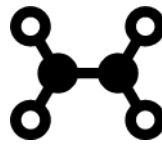
## STUDY QUESTIONS

1. How does utilitarianism's emphasis on "the greatest good for the greatest number" risk obscuring the unequal burdens of unpaid care work, especially for women? Can you think of examples where aggregate welfare was improved, but women's everyday realities were made more difficult?

2. In what ways has the human rights framework advanced feminist struggles (e.g., the Beijing Conference of 1995)? At the same time, how might universalist rights discourses reproduce Eurocentric assumptions about family, autonomy, or women's roles?

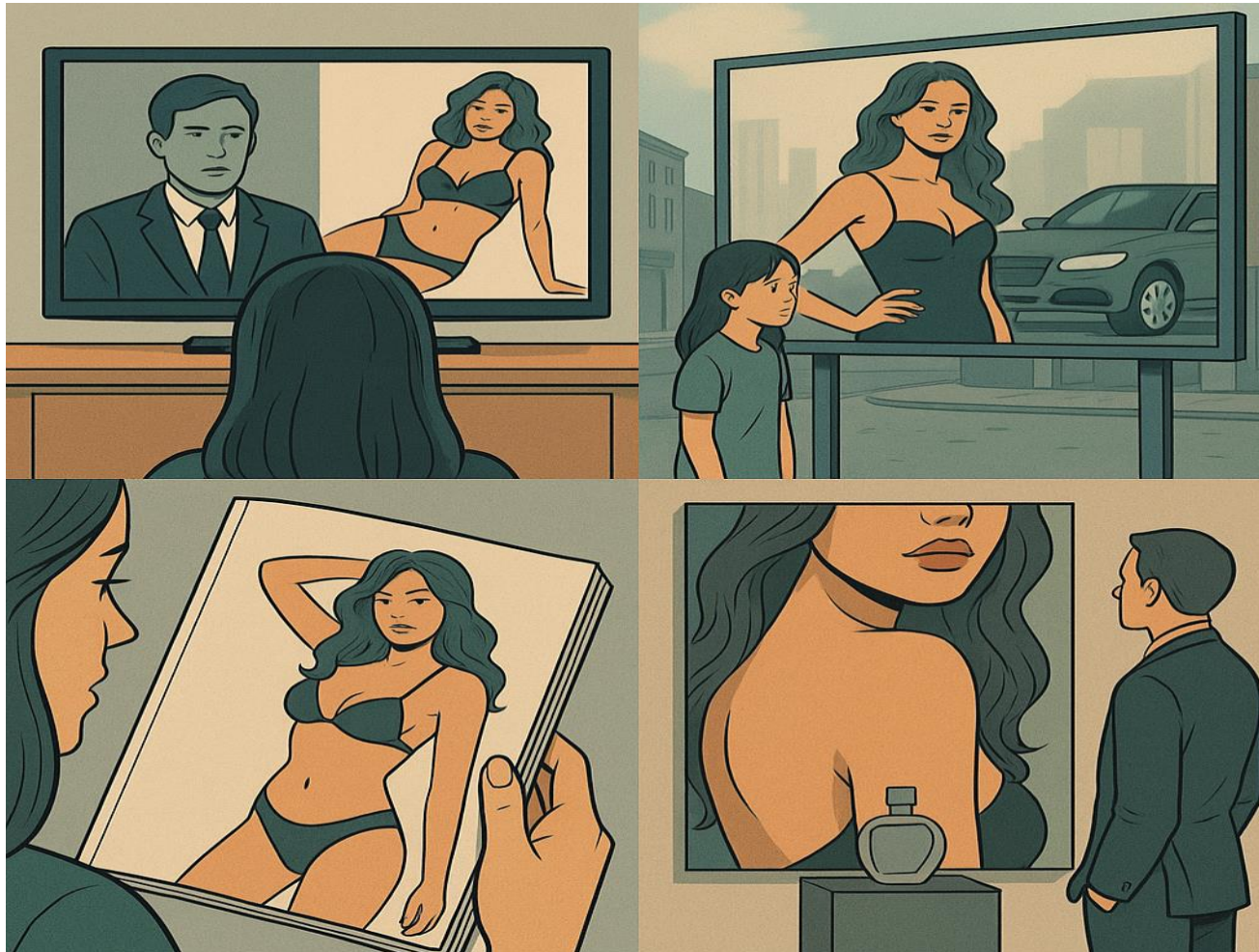
3. The Capabilities Approach asks us to evaluate what people are actually able to do and be. How does this perspective change our understanding of gender equality compared to resource-based or rights-based approaches? Which capabilities do you think are most urgent for achieving gender justice in development today?





## GENDER AND MEDIA

As we move from theories of development and justice into the realm of culture, we encounter one of the most pervasive and powerful forces shaping our social world: media. Understanding gender in international development is impossible without interrogating the role of media, because media is not neutral. It is both a mirror of society and a producer of meaning. Every advertisement, film, news report, magazine cover, television drama, and social media post carries embedded messages about what it means to be a man or a woman.



Media does more than reflect reality: it amplifies, naturalizes, and legitimizes social norms. It tells us what beauty looks like, what success entails, and what roles men and women are expected to occupy. Through constant repetition, media makes particular worldviews appear not just common but natural. In doing so, it exercises immense cultural power, shaping ambitions, desires, and even the boundaries of what we imagine possible.

This is why gender and media matter so profoundly for development studies. If development is about expanding freedoms, opportunities, and capabilities, then cultural institutions like media are decisive in enabling or constraining those freedoms. Media does not simply sell products; it sells gendered worldviews that impact how resources are distributed, how people are valued, and whose knowledge and agency are taken seriously.



## Guiding Questions

1. How do the television shows, advertisements, or films you consume shape your own ideas about what it means to be a woman or a man?
2. Can you think of an example where media reinforced a gender stereotype you later realized was constructed rather than natural?
3. If development is about expanding freedoms, how might the media's reinforcement of gender roles limit or expand people's actual choices?



## Guiding Questions

### MEDIA, STEREOTYPES AND THE PREPRODUCTION OF MASCULINITY

Once we understand that media is not simply entertainment but a powerful cultural institution, we can begin to see how it shapes — and often distorts — ideas of gender. One of the most persistent ways it does so is through stereotyping. Stereotypes reduce complex individuals into simplistic categories that appear natural but are in fact socially constructed.

Across television, film, advertisements, and news, men are routinely portrayed as natural leaders, rational decision-makers, and breadwinners, while women are depicted as nurturers, caregivers, and objects of desire. These representations suggest that masculinity is associated with strength, independence, and authority, while femininity is linked to beauty, passivity, and dependence. Crucially, these stereotypes are not only reflected in media but are also reproduced and reinforced through it.

The danger of stereotypes lies in their normalisation. When audiences are repeatedly exposed to such portrayals, they begin to internalise them as common sense. A young girl who never sees women represented as scientists, political leaders, or athletes may unconsciously limit her own ambitions, while a boy who only sees masculinity represented as aggressive, dominant, or emotionally restrained may feel pressure to perform these traits even when they do not reflect his true self. This process directly undermines gender equality by restricting the range of possibilities open to individuals based on their gender.

Feminist media scholars such as Gaye Tuchman (1978) famously described this process as the “symbolic annihilation” of women. When women are absent, trivialised, or represented in stereotypical ways in the media, their voices and experiences are effectively erased from the cultural imagination. This annihilation does not mean that women literally disappear, but that their presence is so distorted that they cannot be recognised as full, complex human beings.

Linked to stereotyping is the process of objectification. Objectification occurs when people are reduced to their physical appearance or body parts, rather than being seen as whole persons with agency and dignity. In media, women in particular are often depicted as fragmented bodies — legs, breasts, lips — presented for visual consumption. This is most visible in advertising, where women's bodies are used to sell everything from cars to hamburgers, but it is also pervasive in music videos, films, and even news coverage. DeFrancisco (2014) highlights how objectification transforms women into commodities, their worth measured by their ability to attract male attention or sell products.

A related concept is self-objectification, where individuals internalise these cultural messages and begin to see themselves primarily through the lens of others' gaze. For women and girls, this often means evaluating their worth in terms of attractiveness, sexual desirability, or adherence to narrow beauty standards. This can create a cycle of self-surveillance, where individuals police their bodies, clothing, and behaviour in anticipation of being judged. What may appear as empowerment on the surface — for example, dressing in a way that garners attention — can in reality be a constrained form of agency, shaped by the expectation that women's power lies in being looked at.

The consequences of these processes are not abstract. Research consistently links objectification and sexualisation to low self-esteem, body dissatisfaction, eating disorders, depression, and anxiety. For adolescent girls, constant exposure to sexualised imagery can be particularly harmful, reinforcing the



idea that their value lies in their appearance rather than their abilities or character. Although men are increasingly subject to objectification as well, often through ideals of muscularity and strength, the effects remain disproportionately severe for women.

Another mechanism by which media reinforces inequality is commodification. Here, gender differences — and especially women's bodies — are treated as tools for economic profit. Commodification is most evident in advertising, where sexuality is deployed to sell products. Men in advertisements are typically shown as strong, dominant, and in control, whereas women are often depicted as submissive, seductive, or literally positioned beneath men in the visual hierarchy of an image. These subtle cues reinforce broader systems of inequality by continually placing men in positions of power and women in positions of subordination.

Finally, we must consider sexualisation, which goes beyond objectification by reducing a person's entire value to their sexual appeal. Sexualisation imposes restrictive standards of beauty, framing worth in terms of sexual desirability rather than intelligence, creativity, or capability. The problem is magnified when sexualisation targets those who cannot consent, such as children in media portrayals or adolescents pressured by popular culture. As DeFrancisco (2014) warns, sexualisation strips individuals of humanity by equating their existence with sexual attraction alone.

Stereotyping, objectification, commodification, and sexualisation demonstrate that media is far from neutral. It is a key mechanism through which gender hierarchies are sustained and reproduced. For development studies, this recognition is crucial: even as governments and international organisations design gender equality policies, these policies can be undercut by a media culture that continues to naturalise inequality. Media thus operates as both a site of reproduction of gendered hierarchies and a potential site of resistance — a space where stereotypes can be challenged, alternative representations created, and new possibilities imagined.

## IMPACT OF MEDIA

One of the most damaging aspects of media representation lies in the way it dictates what is considered “beautiful” and, by extension, what is considered valuable. Across magazines, billboards, TV shows, and Instagram feeds, we repeatedly see narrow images of beauty: white, thin, tall, blonde, with blue eyes, toned but not too muscular, youthful but not too young. These standards are so normalized that they become invisible—we internalize them and start to believe they are natural, rather than socially constructed and commercially produced.

What this does, of course, is exclude vast swathes of humanity. Women of color, women with different body types, older women, disabled women—these groups are largely erased from mainstream beauty imagery. When they do appear, their features are often exoticized or fetishized, reinforcing stereotypes rather than dismantling them. At the same time, the supposedly “universal” standard of beauty is exported globally through advertising campaigns, Hollywood films, and Western fashion industries, reinforcing Eurocentric ideals even in societies with very different cultural aesthetics.

This relentless promotion of a singular standard teaches people, especially young women and girls, that their worth lies in appearance. More disturbingly, it suggests that if they do not conform, they are not only unattractive but also unworthy of attention, love, or success. This is why we must ask: are choices about how we dress, how we style our hair, or how we present our bodies truly personal? Or are they shaped by an ever-present cultural context that rewards conformity to these standards and punishes deviation?

This is where sexuality-based advertising comes in. Advertisements often rely not just on narrow standards of beauty but on outright sexualization. The “perfect” man or woman—or in some cases, both—are used to sell products as though attractiveness itself can be purchased. The consumer is encouraged to believe that buying the perfume, the car, or the shoes will make them more like the idealized figure in the ad. The underlying logic is both simple and insidious: you don't just want the product, you want to be the product.

The consequences of this are significant. It positions sexuality as a commodity, something that can be purchased, packaged, and consumed. At the same time, it shifts human value away from qualities like kindness, intelligence, or creativity and anchors it almost entirely in physical appearance. Sexualization

is presented as empowerment, but in reality, it often reinforces disempowerment, because the power it gives is conditional—granted only to those who fit the ideal and only for as long as they maintain it.

One of the most influential voices in exposing these dynamics is **Jean Kilbourne**. She began by collecting advertisements, not initially as an academic project but as a personal hobby. Over time, she noticed patterns—particularly the way women were consistently reduced to their bodies, sexualized, infantilized, or depicted as submissive. What started as a collection turned into a career-long project of educating people about the harms of advertising.

Her series of documentaries, *Killing Us Softly*, provides a powerful visual analysis of how advertising images affect our self-perception and our culture. Kilbourne demonstrates, with striking examples, how pervasive these representations are and how they contribute to real-world problems, from gender inequality to violence against women. Her work is not just about critique; it is also about empowerment. By learning to recognize and decode these images, audiences can begin to resist them and demand change.

For teaching, *Killing Us Softly* is particularly effective because students often think they are immune to advertising. They say, “I don’t pay attention to ads,” or “It doesn’t affect me.” Kilbourne’s work shows otherwise—demonstrating how unconscious repetition shapes cultural norms and personal insecurities, whether we notice it or not.

The connection between media portrayals and health outcomes is one of the most worrying aspects of this discussion. There is a vast body of research linking exposure to unrealistic body images with eating disorders such as anorexia and bulimia, as well as with broader mental health issues like depression, anxiety, and low self-esteem (DeFrancisco, 2014). These issues are not just “Western problems.” As global advertising expands, young women and men in societies with historically different beauty norms are increasingly affected. For example, in places where fuller body types were once celebrated, slimness is now marketed as a sign of modernity, progress, and desirability. This creates a cultural clash that often leaves young people caught between competing expectations.

Importantly, the pressures are not limited to women. Men, too, face increasing pressure to conform to muscular ideals, leading to conditions such as muscle dysmorphia. Just as women may feel compelled to diet obsessively, men may resort to excessive exercise, steroid use, or dangerous supplements in order to “measure up.” Perhaps the most vulnerable group in all of this are children. Consider campaigns like Stop the Beauty Madness, which expose how young girls are bombarded with messages that equate their worth with prettiness. A little girl might grow up thinking not “What do I want to be when I grow up?” but “How can I be pretty enough to matter?”

This early internalization has long-term consequences. It shapes aspirations, limits self-confidence, and narrows the range of possibilities that children imagine for themselves. Boys, too, internalize these scripts—learning that to be desirable, they must be strong, dominant, or even emotionally unavailable. The tragedy here is that children are not just passive consumers of media; they are active learners. They absorb and replicate the messages they see. When a child sees their favorite pop star or actor portrayed in a hyper-sexualized way, they may take this as a guide for how they themselves should act. The media, then, is not simply entertainment—it becomes a powerful tool of socialization.

*How do you think these beauty standards and advertising messages influence your own choices? For example, when you pick clothes to wear, or decide whether to post a photo on Instagram—do you feel free, or do you feel constrained by what others will find attractive?*



**PROMPT  
QUESTIONS**

## THE HEALTH AND PSYCHOLOGICAL CONSEQUENCES OF MEDIA'S BEAUTY IDEALS

When we look closely at the impact of media representations, it becomes clear that the stakes are far higher than whether someone feels “good” or “bad” about how they look. Media-driven beauty standards directly shape public health outcomes, family relationships, and even economic participation.

Eating disorders are the most visible outcome. Disorders such as anorexia nervosa and bulimia nervosa are not only highly prevalent in societies saturated with idealized body images but also among the most lethal of all mental health conditions. The constant message that “thinness equals beauty” pushes people, particularly young women, into cycles of extreme dieting, bingeing, purging, or starvation. But these practices are rarely recognized as responses to cultural pressure; instead, they are often medicalized as individual psychological failings. This obscures the social roots of the problem and isolates those who suffer.

Beyond clinical eating disorders, there is the phenomenon of chronic body dissatisfaction. Many people, especially adolescents, live with a persistent sense that they are “not enough” physically. This dissatisfaction becomes a constant background noise in their lives, influencing their willingness to participate in sports, social events, or even professional opportunities. Girls may avoid applying for certain jobs because they do not feel attractive enough; boys may fear ridicule if their bodies do not fit the “masculine ideal.” The cumulative effect is a generation that spends enormous energy monitoring, critiquing, and attempting to control their bodies rather than directing that energy into creativity, education, or activism.

There are also serious mental health consequences. Research consistently links objectification and exposure to idealized images with higher rates of depression and anxiety. For young women, these conditions are often compounded by self-objectification, where individuals begin to see themselves through the eyes of an imagined audience. They become their own surveillants, constantly monitoring posture, body size, hair, makeup, and clothing to anticipate how others might judge them. This “internal policing” is exhausting, and it narrows the space for authentic self-expression.

For young men, the pressures manifest differently but with equally destructive effects. The rise of muscle dysmorphia—sometimes called “bigorexia”—shows how deeply the “ideal male body” is tied to media portrayals of power, dominance, and sexual desirability. Men with this condition may see themselves as perpetually “too small,” even when they are muscular by any objective standard. The result is compulsive weightlifting, supplement use, and sometimes dangerous anabolic steroid consumption. Like women, these men are caught in a cycle of dissatisfaction, fueled by advertisements and movie portrayals of hyper-muscular action heroes.

Importantly, the psychological consequences ripple outward. When people live under the constant pressure to meet unattainable ideals, it undermines relationships. Friendships and romantic relationships may suffer when one or both partners are preoccupied with their own appearance. Parents who are themselves struggling with body image are less able to model healthy relationships to food, exercise, or self-acceptance for their children. And on a collective level, entire societies are drained by the resources poured into beauty and diet industries instead of into public goods like education or healthcare.

We also need to address the issue of intersectionality here. Media portrayals do not affect everyone equally. Women of color, LGBTQ+ individuals, and disabled people face layered pressures. For example, a Black woman may be pressured to conform to Eurocentric beauty standards around hair and body type, while simultaneously facing hyper-sexualized stereotypes. A gay man may be doubly vulnerable to body image pressure in communities where muscularity and appearance are closely tied to desirability. Disabled individuals often face complete erasure from media, which suggests that only

“able” bodies are worthy of representation or desire. In all these cases, the consequences are compounded, producing not only health problems but also deep feelings of exclusion and invisibility.

Finally, it is worth emphasizing that the commercialization of body ideals has created a vast global industry. The diet industry, the beauty industry, the plastic surgery industry, and the fitness industry all profit from insecurity. Their financial success depends on keeping people dissatisfied. Each time someone buys a product promising weight loss, clearer skin, fuller lips, or bigger muscles, they reinforce the cycle. Jean Kilbourne’s insight is crucial here: advertising does not simply sell products, it sells values, images, and norms. It sells us the idea that we are inadequate and then sells us the “solution.”

## MEDIA AS A SITE OF RESISTANCE

The gendered effects of media are not limited to Hollywood blockbusters or glossy magazines. They permeate development and policy arenas in both subtle and explicit ways. For instance, the EU’s own campaigns on women’s empowerment often struggle with representational traps. Posters celebrating “women in STEM” sometimes reproduce the stereotype of the exceptional “female genius,” implying that women’s place in science is rare and surprising, rather than normal. Similarly, media coverage of female politicians within the EU continues to focus disproportionately on their appearance, family roles, or emotional style, while male politicians are judged on policies and leadership. These patterns illustrate how media undermines political equality by framing women’s credibility through a gendered lens.

Globally, development campaigns have long mobilised media as a tool for social change — but not always successfully. The famous UNICEF and MoNE “Girls’ Education Campaign” (Turkey, 2003) used television spots and celebrity endorsements to encourage families to keep their daughters in school. While successful in raising enrolment rates, critiques emerged about how the campaign’s imagery often portrayed girls as passive beneficiaries needing rescue, rather than as agents of their own futures. Similarly, campaigns such as Nike’s “Girl Effect” initiative received attention for highlighting adolescent girls as key to development, but they were also criticised for reducing complex issues of poverty and patriarchy to individual stories of empowerment, often stripped of local cultural context.

At the same time, media stereotypes shape global perceptions of development itself. African countries, for example, are often depicted in Western media through images of poverty, disease, or helpless women and children. This not only strips individuals of dignity but also sustains a paternalistic view of development, where the Global North appears as the saviour and the Global South as the perpetual victim. From a feminist epistemic justice perspective, such portrayals are deeply problematic because they silence the knowledge, agency, and diverse voices of women in the Global South.

While media has often reinforced stereotypes and inequalities, it is also a powerful site of resistance and transformation. Feminist activists, NGOs, and even state institutions have harnessed media to challenge cultural norms and amplify marginalised voices.

One example is the Council of Europe’s “Gender Equality Strategy” (2018–2023), which explicitly identifies media as a domain for intervention, promoting gender-sensitive journalism and equal representation in newsrooms. EU-funded projects such as ETCEP (Promoting Gender Equality in Education, Turkey) also invested in revising textbooks and media materials to eliminate sexist imagery and language.

Social media platforms have become equally important arenas of feminist resistance. Campaigns like #MeToo and #NiUnaMenos disrupted mainstream narratives by making women’s experiences of violence and harassment visible on a global scale. In the EU, movements like #MeTooEU and initiatives by European Parliament’s Committee on Women’s Rights and Gender Equality (FEMM) show how digital platforms can counteract silencing by giving credibility to voices that were historically dismissed.

Cultural products — from feminist films to music videos that subvert gender norms — also demonstrate the transformative potential of media. Documentaries like *Miss Representation* (2011) directly critique the media’s role in limiting women’s ambitions, while EU-backed films under the Creative Europe programme provide funding for works that challenge dominant narratives and promote gender diversity on screen.



By recognising media not only as a site of domination but also as a site of contestation, students can begin to see how feminist epistemic justice involves reclaiming representation. Media can naturalise inequality, but it can also serve as a platform for alternative knowledges, plural voices, and resistant imaginaries.

## VIDEO RESOURCES

To complement our discussion of utilitarianism, the human rights approach, and the capabilities approach, please watch the following videos. Together they will help you visualize and compare how different traditions of thought frame questions of justice, rights, and development.

Justice: What's the Right Thing to Do? (Episode 1, Michael Sandel) – Watch the first 11 minutes carefully, focusing on the trolley and fat man dilemmas, which illustrate the utilitarian perspective.

Amartya Sen #1 on Capabilities – A short introduction where Sen explains why freedom and real opportunities are at the heart of development.

An Introduction to Amartya Sen's Development as Freedom (Macat Analysis) – A clear overview of Sen's arguments about why development should expand human freedoms.

A Human Rights Based Approach – PLANET – An accessible presentation of how human rights principles (participation, accountability, non-discrimination, empowerment) guide development practice.

Please take notes as you watch and try to map how each approach addresses the central question of what counts as development and justice.

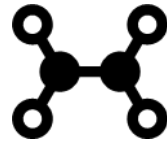


## STUDY QUESTIONS



1. How do media representations of men and women reinforce gender stereotypes, and what are the long-term social and psychological effects of this repetition?
2. In what ways do processes of objectification, commodification, and sexualization in media contribute to the reproduction of inequality? Can you identify concrete examples from advertisements, film, or social media?
3. How might media also serve as a site of resistance, offering counter-narratives that challenge dominant gender norms?





## EMPOWERMENT and INFORMAL INSTITUTIONS

The previous chapter on gender and media highlighted how representation matters: not only in terms of visibility but also in shaping whose voices are amplified and whose are silenced. Media representations reinforce stereotypes, constrain possibilities, and often perpetuate epistemic injustices by positioning women's experiences, knowledge, and aspirations as secondary or irrelevant. This insight provides a powerful bridge into the theme of empowerment and informal institutions. Just like media, institutions—whether formal or informal—operate through visible and invisible rules. These rules define who can speak, who can act, and whose contributions are recognised as legitimate. To understand empowerment, we must therefore examine not only material resources but also the social structures and epistemic frameworks that govern recognition and authority.



Empowerment has long been central to debates in development studies, though its meaning remains contested. At its simplest, empowerment refers to strengthening the capacity of individuals and communities—particularly women and girls—to exercise control over their lives. Yet, as Naila Kabeer (1999) famously argues, empowerment cannot be reduced to the provision of resources alone. It must be understood as a process with three interconnected dimensions: resources, the material and symbolic tools available to individuals; agency, the ability to define goals and act upon them; and achievements, the outcomes of exercising agency. This framework moves beyond technocratic understandings of empowerment as something “given” to women and instead emphasises empowerment as a dynamic,

relational process of expanding people's capacity to make meaningful choices in contexts where such capacity was previously denied.

From this perspective, empowerment is not simply individual but collective. Scholars such as Rowlands (1997) and Molyneux (1985) remind us that empowerment entails both personal transformation and collective mobilisation. Women's empowerment must therefore be seen as political: a challenge to structural inequalities and informal norms that reinforce subordination. This dual dimension connects empowerment directly to questions of feminist epistemic justice. To be empowered means not only to have resources and rights, but also to be recognised as a credible knower whose interpretations and testimony are taken seriously. Without epistemic recognition, formal rights risk becoming hollow.

In the 1990s, international development actors sought to measure empowerment through indices such as the Gender-related Development Index (GDI) and the Gender Empowerment Measure (GEM), both introduced by the UNDP. These indices attempted to quantify empowerment by measuring women's participation in politics, their economic opportunities, and their representation in human development. Yet these measures faced sharp critique (Dijkstra & Hanmer 2000; Bardhan & Klasen 1999). Counting women in parliaments or professional roles may indicate progress, but it does not necessarily mean that women's interests are represented substantively, nor that discriminatory informal institutions have been dismantled. The problem lies in what Cornwall and Edwards (2010) call "empowerment lite"—a watered-down version of empowerment that is celebrated in policy discourse but fails to transform underlying hierarchies of gender, class, and race.

This critique resonates with the concept of epistemic injustice (Fricker 2007; Medina 2013). Testimonial injustice occurs when women's voices are not believed or are undervalued, even when they occupy positions of authority. Hermeneutical injustice arises when women's lived experiences—such as domestic violence, unpaid care work, or exclusion from male-dominated networks—are not adequately understood within dominant interpretive frameworks. Addressing empowerment without tackling these injustices risks reproducing exclusion under the guise of inclusion.

Empowerment in development practice must therefore go beyond redistributing material resources. It must involve transforming both formal and informal institutions, challenging discriminatory norms, and expanding interpretive resources so that women's experiences are intelligible and valued. Genuine empowerment is relational, intersectional, and collective. It emerges not from being granted opportunities from above but from grassroots mobilisation, feminist movements, and everyday practices of resistance that shift the boundaries of who is seen as credible, capable, and authoritative.

Framed in this way, empowerment becomes both a developmental and an epistemic goal. It is about redistributing resources, opportunities, and credibility. It is about ensuring that women's voices count—not as symbolic tokens but as authoritative contributions to shaping policies, practices, and futures. Empowerment, then, is not merely a box to tick on a development agenda; it is a transformative process that challenges entrenched hierarchies and reconfigures who gets to define the terms of social life.

## Guiding Questions

1. How does Kabeer's (1999) framework of resources, agency, and achievements help us move beyond simplistic understandings of empowerment?
2. What are the risks of "empowerment lite," and how can development practice avoid reproducing this problem?
3. In what ways do testimonial and hermeneutical injustices undermine genuine empowerment in both formal and informal institutions?



## Guiding Questions

### FROM EMPOWERMENT TO EUROPEANISATION: INFORMAL INSTITUTIONS AND THE GAP BETWEEN NORM ADOPTION AND NORM APPLICATION

Picking up from the discussion on empowerment and the informal rules that often dilute its promise, the EU's enlargement history offers a concrete laboratory for observing how formal gender-equality standards travel—and where they stall. Europeanisation scholarship is centrally concerned with "how Europe matters" domestically (Kröger 2018): what kinds of changes EU rules generate in national policies, institutions, and actor coalitions, and why those changes sometimes remain largely symbolic. This lens connects closely with feminist debates on epistemic injustice, because it distinguishes between the adoption of norms in law and the application of norms in practice—the very gap in which testimonial and hermeneutical injustices tend to survive.

The EU's gender-equality template did not emerge fully formed from Brussels. It was built gradually and politically, often shaped by contingent national interests. The equal pay clause in the 1957 Treaty of Rome, for example, owed less to feminist conviction than to French anxieties about trade competitiveness against economies reliant on cheaper female labour (Pillinger 1992; Fagan & Rubery 2018). Substantive momentum only came in the mid-1970s with equal pay and equal treatment directives. From there, the template was continually reshaped by national politics. The Thatcher governments in the UK sought to dilute social-policy legislation around maternity, paternity, and part-time work during the 1980s and 1990s, while Southern European newcomers introduced anti-discrimination laws as a means of bolstering their membership prospects (Fagan & Rubery 2018). A turning point arrived with the 1995 accession of Finland and Sweden—countries with robust domestic gender traditions—who helped push the EU toward a unified stance at the Beijing Conference. This was followed by the Commission's 1996 commitment to gender mainstreaming, the 1997 European Employment Strategy, and the Treaty of Amsterdam's expansion of non-discrimination provisions to more explicitly intersectional grounds (Pollack & Hafner-Burton 2000; Elgström 2000). In other words, the EU's gender project was not a top-down imposition but a co-produced framework—initially forged through bottom-up dynamics within the Union, and later exported outward through the enlargement process.

Scholars identify three pathways through which this export operates. The first, interest-driven change, emphasises conditionality: candidate states weigh the costs of compliance against the benefits of EU incentives (Schimmelfennig & Sedelmeier 2005). This pathway is most effective when EU demands are clear, incentives are sizeable and credible, and domestic adoption costs are low because veto players are few or supportive. The European Social Fund's conditionality moved Greek employment policy in this way, whereas Finland, already strong on family-work reconciliation, presented little "misfit" for Brussels to exploit (Zartaloudis 2015; Eräranta & Kantola 2016). In Central and Eastern Europe, conditionality explains many of the legal equal-treatment reforms introduced during accession (Anderson 2006; Chiva 2009). Yet conditionality also highlights fragility: change is often thin or reversible when credibility declines, incentives are delayed, or domestic veto players are

strong. Turkey provides an example: credibility rose with the 1999 candidacy decision and opening of accession negotiations in 2005 but fell during negotiation suspensions and vetoes, and further eroded when migration diplomacy displaced rule-of-law conditionality (İçduygu & Aksel 2014; Müftüler-Baç 2016). At the domestic level, fragmentation in the party system, strong party discipline in candidate selection, a judiciary with limited gender sensitivity, and conservative veto players all raised adoption costs and constrained reforms. Where women's movements were well-organised and allied across parties, they were able to lower those costs and push reforms further (Avdeyeva 2010).

The second pathway, norm-driven change, works through persuasion and social learning. Here, reforms move not because of sanctions and incentives but because political actors identify with "Europe," participate in EU-sponsored networks, and perceive EU rules as legitimate (Checkel 2005; Börzel & Risse 2003). Soft-law instruments such as the European Employment Strategy and ESF projects have been influential in reframing policy problems and diffusing new practices. Finland's family-friendly workplace experiments offer a case in point (Eräranta & Kantola 2016). Yet legitimacy is fragile when gender-equality policies are unevenly applied across member states or instrumentalised primarily as tools for economic growth (Elomäki 2015). Domestic resonance also plays a critical role: norms already embedded in socialist labour traditions, such as equal pay or maternity protections, travelled relatively easily in post-communist settings, while norms challenging the private sphere—such as protections against domestic violence or recognition of LGBTQI+ rights—proved much harder to embed (Dobrotić et al. 2013; Havelková 2010). In Turkey, identification with Europe has oscillated. Early Justice and Development Party rhetoric adopted a pro-EU stance, but often in a selective and instrumental fashion—for instance, using EU leverage to remove the headscarf ban—while deeper structural reforms on gender equality were side-stepped (Kumbaracıbaşı 2016; Dikici Bilgin 2017).

The third pathway, lesson-driven change, begins with domestic dissatisfaction and the search for solutions abroad. Policymakers treat the EU not as an authority to obey but as a repertoire of ideas and expertise. Policy transfer can take a rationalist form, where new information refines instruments while leaving goals intact, or a sociological form, where deeper learning redefines goals themselves (Rose 1991; Deutsch 1963; Dolowitz & Marsh 2000). Turkey's experience with domestic violence legislation is illustrative. Public dissatisfaction and feminist advocacy led to a nationwide survey in 2008 and the adoption of the 2012 Law on the Protection of the Family and the Prevention of Violence against Women. In designing implementation, officials and NGOs looked to Italian and Spanish models, selectively adapting them to Turkish realities (Palmén et al. 2016). Such exchanges redefined domestic violence from a private matter to a public wrong, expanding state responsibility.

## REPRESENTATION, OUTCOMES AND THE LIMITS OF FORMAL REFORM

Representation has long been seen as a visible marker of women's empowerment. Quotas, parity laws, and equal treatment directives signal progress by securing women's entry into parliaments, ministries, and party lists. At the EU level, conditionality and enlargement rules encouraged such reforms, framing representation as both a democratic good and an economic necessity. However, the relationship between representation and empowerment is not straightforward. Representation may open doors, but the quality of women's participation, their influence over decision-making, and the durability of reforms depend heavily on the interplay between formal and informal institutions.

The distinction between norm adoption and norm application is crucial here. Adoption often means passing quota laws, ratifying conventions, or establishing gender-equality bodies. These measures are important—they provide legal hooks, institutional venues, and symbolic recognition. Yet their impact on empowerment remains limited if application falters. In practice, party elites may place women candidates low on electoral lists, ensuring compliance with quotas but denying women winnable seats. Equality bodies may exist on paper but lack resources, independence, or political authority. Courts may interpret anti-violence legislation through patriarchal assumptions, re-privatising harms that law has defined as public wrongs. These examples show how informal institutions—norms of party discipline, patronage logics, judicial cultures—mediate between formal adoption and lived outcomes.



From a Europeanisation perspective, this gap between adoption and application explains much of the unevenness in gender-equality outcomes across member and candidate states. Conditionality can secure legal reforms when incentives are strong, but application requires ongoing political will, social resonance, and bureaucratic capacity. Norm-driven change through social learning may diffuse practices, yet their implementation is filtered by domestic understandings of family, honour, or morality. Lesson-driven change can import effective models, but the transferability of those lessons depends on whether informal rules allow them to take root. In each pathway, informal institutions act as either facilitators—providing networks, shared meanings, and social legitimacy—or as obstacles, reproducing hierarchies that blunt reform.

This is where the limits of formal reform become apparent. Representation and equality directives often produce what feminist scholars call “empowerment lite” (Cornwall & Edwards): policies that look transformative but stop short of redistributing authority. Without shifts in testimonial credibility (whose voices are believed) and hermeneutical resources (which harms are intelligible), representation risks remaining symbolic. For instance, women may gain parliamentary seats but find themselves confined to “soft” policy areas or excluded from leadership roles. They may enter ministries but inherit mandates stripped of budgets and decision-making powers. In such cases, the visibility of women does not automatically translate into empowerment; instead, it coexists with entrenched informal norms that define the boundaries of acceptable participation.

Outcomes can therefore be categorised along three trajectories. Positive change occurs when both adoption and application align, and empowerment deepens through second- or third-order reforms—such as when gender mainstreaming shifts from being a procedural add-on to becoming the central organising logic of employment or social policy. Negative change reflects de-Europeanisation, where formal commitments are rolled back or hollowed out, and equality is recast as alien to national identity. Selective change is the most common outcome: incremental steps that introduce new rules alongside old ones, often creating hybrid regimes of partial compliance. Selective change may feel frustratingly modest, but it can also create footholds for feminist actors—party “femocrats,” NGOs, transnational networks—to push for deeper reforms over time.

In this light, representation should be understood less as an endpoint and more as a strategic terrain. It matters who is present in decision-making arenas, but it matters just as much how those arenas are structured, which rules (formal and informal) govern participation, and what resources are available to translate presence into influence. Empowerment through representation requires a double move: securing legal and institutional entry points while simultaneously working to transform the informal institutions that determine how far women’s voices carry once inside. From the perspective of empowerment, this distinction matters profoundly. Conditionality may expand resources, social learning may broaden ideas of what is legitimate, and lesson drawing may yield new institutional designs. But genuine empowerment requires informal institutions themselves to change: women’s testimony must be taken seriously in courts and administrative offices; interpretive frameworks must shift so that private harms become visible as public wrongs; and organisational routines in parties, unions, and ministries must stop penalising those who claim new rights. Without such shifts, reforms risk producing only a thin version of empowerment—the appearance of progress without a redistribution of power.

Two major instruments highlight these dynamics. UN Security Council Resolution 1325 (2000) established the Women, Peace and Security agenda, recognising women as security actors and calling for their participation, protection, and inclusion in post-conflict processes. The EU embraced WPS in external action and security-sector reform, with some success in places like Ukraine and Afghanistan (Ansorg & Haastrup 2018). Yet the adoption/application gap remains stark, as militarised cultures and nationalist politics often sideline women’s knowledge at the point of implementation. Similarly, the Council of Europe’s Istanbul Convention (2011) created the most comprehensive framework against gender-based violence in Europe. Ratification seemed a triumph of adoption, but its application has varied. Where funding supported shelters, training, and survivor-centred policing, practice changed; where patriarchal beliefs persisted or anti-gender movements reframed the Convention as foreign intrusion, compliance remained symbolic or was rolled back altogether. These cases underline how



informal institutions—norms about family, honour, security, and national identity—can either facilitate or block the empowerment promised by formal rules.

To assess the EU's impact on gender equality, it is not enough to note whether directives are transposed or treaties ratified. What matters is the magnitude and quality of change produced once EU rules meet domestic contexts. Scholars of Europeanisation differentiate between norm adoption and norm application, and then classify the observed changes into three types: positive, negative, and selective. This typology is especially helpful for examining how empowerment is facilitated or hindered by informal institutions.

Positive change captures compliance with EU requirements and, in some cases, their deep institutionalisation. At the minimal end, this involves legal harmonisation: the introduction of equal-treatment laws, anti-discrimination directives, or quota mechanisms. At the more profound end, it involves transformative reforms that restructure domestic institutions and prioritise gender mainstreaming as a central policy goal. Zartaloudis (2015) distinguishes between “second-order change,” when existing programmes are thoroughly overhauled or new ones are introduced to mainstream gender, and “third-order change,” where the very goals of policy are redefined so that gender equality becomes the organising principle. The Nordic accession cases illustrate this higher-order change: Finland and Sweden not only adopted EU standards but reshaped EU gender policies themselves, embedding family-friendly practices and a commitment to intersectionality in the 1990s. Positive change of this kind is what transforms empowerment from rhetoric into lived redistribution of agency—when budgets shift, survivor-centred justice becomes routine, and women's testimony is institutionalised as authoritative.

Negative change refers to processes of de-Europeanisation (Aydın-Düzgit & Kaliber 2016). Here, Europe (and EU norms) lose their function as domestic reference points. De-Europeanisation may take the form of outright withdrawal from commitments, but more often it appears as symbolic compliance or discursive detachment. States may keep equality language in law while hollowing out enforcement bodies, defunding equality agencies, or framing gender directives as foreign impositions. Informal institutions play a decisive role: nationalist narratives may reframe gender equality as “Western” intrusion; patriarchal norms may normalise violence against women despite binding legal prohibitions. This is not simply a retreat from Brussels but the reassertion of domestic androcentric frameworks, which render women's harms less nameable and their testimony less credible in courts, police stations, or political debates.

Selective change occupies the ambiguous middle ground. It refers to situations where some reforms are introduced while others are stalled or undermined. Sometimes this takes the form of first-order change—minor tweaks to existing programmes without challenging underlying logics (Radaelli 2002; Zartaloudis 2015). Sometimes it is better understood as layering (Mahoney & Thelen 2010): new rules are placed on top of old ones, leaving contradictory institutional logics coexisting in the same system. Selective change can be double-edged. On the one hand, it risks producing “optical compliance”: the appearance of progress without substantive redistribution, leaving empowerment “lite.” On the other hand, layering can also be strategic. It may preserve space for feminist bureaucrats (“femocrats”) and allies to gradually push institutions toward deeper reforms, insulating core achievements from rollback. For example, party quotas in Turkey or the Balkans may have been introduced without overturning patriarchal candidate-selection practices, but they nonetheless created footholds that women's organisations later used to demand more robust participation.

Bringing this back to empowerment and informal institutions, the typology underlines why measuring change only by formal adoption is misleading. A positive change in law can mask negative or selective practices in application. Anti-violence laws may be adopted (positive change at the adoption level) but enforced selectively or patriarchally in courts (negative change at the application level). Quotas may be introduced but implemented in ways that funnel women into symbolic positions (selective change). Conversely, even without new formal adoption, application-level changes can occur when coalitions succeed in redirecting resources, professional practices, or cultural interpretations.

This is precisely why empowerment is best conceptualised not simply as access to rights or resources but as the redistribution of agency across both formal and informal institutions. Empowerment requires not only positive adoption but positive application—where the tacit rules of

politics, law, and society shift to recognise women's testimony, broaden interpretive frameworks, and reconfigure organisational routines. Without this, the adoption/application gap remains the space where epistemic injustice persists.

## EMPOWERMENT, INFORMAL INSTITUTIONS AND EVERYDAY PERFORMANCES

The discussion of empowerment and informal institutions shows that formal commitments to gender equality—whether through constitutions, international treaties, or EU directives—rarely translate automatically into transformative outcomes. Empowerment is not secured simply by the provision of rights, resources, or opportunities; it requires the agency and credibility to use them in ways that reshape daily practices and decision-making structures. This is why the distinction between norm adoption and norm application is so important. Adoption alters the letter of the law; application determines whether those laws shift lived realities and redistribute authority.

Across different contexts, empowerment has been advanced through policy reforms, legal quotas, and institutional innovations. Yet these are continually filtered by informal institutions—party-list gatekeeping, patronage logics, patriarchal judicial cultures, or nationalist narratives—that reinterpret or blunt equality norms. It is in these spaces that testimonial injustice (when women's voices are disbelieved or discredited) and hermeneutical injustice (when women's harms remain nameless or unintelligible) persist, even where formal rights exist.

The typology of positive, negative, and selective change helps us capture this dynamic. Positive change occurs when reforms are implemented in ways that adapt informal rules, producing second-order improvements or even transformative third-order shifts. Negative change emerges when patriarchal norms hollow out commitments, reducing equality to rhetoric. Selective change describes the most common reality: incremental reforms layered onto entrenched practices, which may yield only surface compliance but can also create footholds for gradual transformation.

This perspective reframes empowerment as an ongoing struggle over how formal and informal institutions interact, rather than an endpoint delivered by policy. For development debates, the key lesson is that durable empowerment requires recognition of women's knowledge, experiences, and agency as authoritative—not just access to formal rights.

With this in mind, the transition to next week's theme becomes clear. Informal institutions endure because they are enacted and re-enacted in daily performances. Committee meetings reproduce hierarchies when men speak first and last, recruitment rituals valorise "masculine" styles of authority, and family norms position care as women's natural duty. These repeated acts make informal rules appear natural and inevitable. Yet, as Judith Butler reminds us, what is performed can also be disrupted. When women chair committees, men take parental leave, or survivors speak publicly as experts, alternative performances denaturalise existing rules and open space for change.

Understanding empowerment as constrained or enabled by informal institutions thus prepares the ground for analysing gender performances and performativity. The next step is to examine how gender itself is "done" and "redone" in everyday practices, and how those performances sustain or contest the institutional orders that shape empowerment.

## VIDEO RESOURCES

The videos accompanying this week's lecture provide additional perspectives on empowerment, informal institutions, and gender performativity. They illustrate how gender equality debates move between formal commitments and the everyday practices that sustain or disrupt them, offering both theoretical insights and practical examples that reinforce the lecture's core themes.

### **Economic Empowerment — EPISODE 6: Women's Economic Empowerment: The Everyday Challenges Women in the Informal Economy Face**

This video explores how women working in informal economic sectors encounter specific structural barriers—lack of formal recognition, unstable income, limited access to social protection, and exclusion from policymaking. Useful for linking how formal policies often overlook or inadequately address informal institutions and practices that shape daily economic lives. Emphasises lived experience and the gap between legal rights and economic reality.

### **Disrupting Institutional Rules and Organizational Practices for Women's Rights and Gender Equality**

Examines how certain institutional structures (often informal ones) are challenged from within—for example, how organisational rules or standard practices work to limit women's influence and how these might be changed. It includes concrete examples of practices inside political or bureaucratic organisations. Very helpful for illustrating how “norm application” can be resisted or reshaped.

### **Gender equality means empowering women and girls**

An official short documentary/promo video from UN Women that connects gender equality with empowerment in development. Less theoretical, more illustrative: shows programs, challenges, and outcomes. Good for seeing empowerment in practice in multiple settings. Useful to contrast with videos that explore theory or institutional dynamics.

### **Discussions of Informal Learning and Gendered Norms**

Explores how informal learning contexts (community, media, peer groups) shape gender norms during crisis periods. This is valuable for thinking about how informal institutions exert influence outside formal policy, especially when formal systems are under stress or failing.



## STUDY QUESTIONS

1. Kabeer (1999) frames empowerment as a process involving resources, agency, and achievements. How does this tripartite definition challenge narrow, technocratic approaches to empowerment in development policy? Can you think of an example where resources were provided but empowerment did not materialise?
2. Cornwall and Edwards (2010) warn against “empowerment lite,” where empowerment is celebrated rhetorically but stripped of its radical potential. Looking at indices such as the GDI and GEM, do you think measuring empowerment through numbers (e.g., seats in parliament, wage gaps) can ever capture its deeper dimensions? Why or why not?
3. How do testimonial and hermeneutical injustices intersect with informal institutions to undermine women’s empowerment? For example, how might party gatekeeping, judicial culture, or media stereotypes reinforce epistemic injustices even after formal rights have been granted?
4. Using the adoption/application distinction, how would you evaluate the EU’s impact on gender equality in candidate countries such as Turkey? Which pathway of Europeanisation (interest-driven, norm-driven, lesson-driven) seems most effective in promoting genuine empowerment, and why?
5. Can you identify examples (from Europe, Turkey, or beyond) where formal adoption of gender-equality norms led to:
  - Positive change (deep institutional transformation),
  - Negative change (rollback or hollowing out), or
  - Selective change (incremental, layered reforms)?

How do informal institutions shape these trajectories?

6. Drawing on Butler’s concept of performativity, how might everyday performances of gender (e.g., in families, workplaces, or parliaments) reinforce or disrupt informal institutions? Can you think of a situation where such performances opened new space for empowerment?



## EMPOWERMENT AGENCY, PERFORMATIVITY AND SUBVERSION- MASCULINITIES AND FEMININITIES

The discussion of informal institutions highlighted how much of gender inequality survives not in the formal rules of law or policy but in the tacit, everyday practices that shape opportunities, authority, and recognition. Informal institutions persist because their rules are reproduced continuously, not through written statutes, but through routine interactions, habits, and expectations. These practices become so



ingrained that they appear “natural” or “inevitable.” But if they are enacted in daily life, they can also be challenged there. This is where the conceptual move from institutions to performance and performativity becomes central.



Performance draws attention to the active dimension of gendered behaviour. Following Erving Goffman, performance is the way actors “do” gender in social situations by presenting themselves within particular frames of meaning and under specific felicity conditions. In this view, agency is not erased: individuals attempt to craft impressions of themselves before others, whether in a workplace, a classroom, or a political negotiation. For example, men who speak first and last in a committee reproduce masculine authority through performance; women who strategically adapt their tone to be heard are also performing, though under unequal felicity conditions. The sociological insight here is that performances are not freely chosen but are constrained by the cultural context in which they unfold.

Judith Butler’s concept of performativity pushes this argument further. Butler insists that gender is not something one simply “does” in a voluntary sense, but something one “becomes” through repeated, stylised acts that are socially compelled. Performativity is not the same as performance; rather, it refers to the constitutive force of discourse. To say that gender is performative is to recognise that it does not pre-exist its enactment. It is produced and reproduced through reiteration, much like a speech act that brings into being what it names. When someone is hailed as a “girl” or “boy,” the utterance itself performs an action: it binds, categorises, and sets the conditions for how that subjectivity will be lived.

The difference between performance and performativity is therefore crucial. Performance presupposes an actor who chooses how to present themselves within certain frames; performativity shows how the very subject who “performs” is already constituted by discourse, by norms, and by cultural scripts that



precede them. Goffman helps us see how agency is exercised in interactions; Butler reminds us that this agency is always shaped and constrained by the discursive field that gives gender its intelligibility.

This distinction matters profoundly for empowerment and development debates. If empowerment is reduced to the provision of rights, resources, and opportunities, it risks assuming that women and men can simply “perform” equality once these tools are in hand. Yet the performative constitution of gender means that inequalities persist even when rights exist on paper, because the cultural frames and felicity conditions of interaction continue to naturalise subordination. For example, anti-violence laws may exist, but if police officers interpret a woman’s testimony through patriarchal lenses, her words are not granted credibility. Similarly, women in politics may formally have access to office, but informal rules of respectability and hyper-criticism of their appearance shape how their authority is received. These are performative constraints, not merely individual performances.

At the same time, both performance and performativity contain the seeds of subversion. Informal institutions endure because rules are enacted repeatedly, but repetition also opens the possibility of rupture. Alternative performances—women chairing committees, men taking on care responsibilities, survivors speaking publicly as experts—disrupt the felicity conditions that normalise subordination. Butler’s insight that repetition is never perfect means that every enactment is also a chance to re-signify norms. Gendered subjectivity is thus both constrained and potentially reimaged through practice.

By linking empowerment, informal institutions, and performativity, the analysis shifts from seeing gender equality as a matter of distributing resources to understanding it as a question of reconstituting the very frameworks that define who is seen, heard, and valued. Empowerment requires more than rights; it requires transformations in the performative conditions under which rights are recognised and acted upon. The transition to performativity therefore brings us closer to lived experience: to the embodied, everyday ways in which gender is produced, contested, and possibly transformed.

## BUTLER’S “PERFORMATIVITY VS GOFFMAN’S “PERFORMANCE”

Judith Butler’s theory of performativity unsettles the idea that gender is something an individual already “has” and then expresses. Instead, gender is constituted through repeated acts that both name and produce the subject. For Butler, performative acts are forms of authoritative speech: like other speech acts, they do not merely describe reality but create it. When a newborn is declared “It’s a girl” or “It’s a boy,” the utterance does not neutrally identify; it inaugurates a social identity that will structure the possibilities of life.

In this sense, performativity does not presuppose a fully autonomous actor. Rather, it reveals that the actor themselves is the product of discourses and norms that precede them. Gender becomes intelligible through reiteration: through the repetition of dress codes, gestures, bodily comportments, and speech patterns that signify “masculinity” or “femininity.” These norms are not chosen freely; they are culturally compelled.

This has direct implications for empowerment. Policies that provide rights or resources assume that women, once equipped, can “use” them to achieve equality. But performativity reminds us that access alone is insufficient. If women’s voices are discredited in courtrooms, if survivors of violence are framed as dishonourable, if professional success requires embodying masculine codes of authority, then empowerment is undermined at the level of recognition. The performative conditions of speech and action must shift for empowerment to become real.

Yet Butler also insists on the possibility of subversion. Because repetition is never perfect, every enactment of gender leaves room for variation. Small disruptions—a man choosing parental leave, a woman refusing deferential speech, a survivor speaking publicly as an authority—can expose the contingency of norms and open space for re-signification. The same mechanisms that produce constraint also contain the seeds of transformation.

Erving Goffman offers a complementary but distinct lens through the concept of performance. Where Butler highlights how discourse constitutes subjectivity, Goffman focuses on agency in interaction. Performance refers to the ways actors present themselves in social encounters, seeking to influence how others perceive them. Gender, in this sense, is not only a structural imposition but also a strategic accomplishment achieved in interaction.

Goffman introduces the concepts of frames and felicity conditions to explain how performances are constrained. Frames are “schemata of interpretation” that allow people to identify, label, and give meaning to situations (Goffman 1974). Felicity conditions are the cultural rules that define when an act counts as appropriate, intelligible, or credible. In gendered interactions, these frames and conditions establish the boundaries of agency. For example, in a workplace meeting, the frame of “expertise” may privilege masculine styles of authority (assertive speech, refusal to hedge claims), while felicity conditions may render women’s contributions less credible unless they mirror these masculine performances.

Unlike Butler, Goffman does not disregard agency. Performances are shaped by cultural frames, but individuals still have room to manoeuvre, to craft impressions, and to negotiate identities. Agency is exercised within constraints, and selfhood emerges as a reflexive project achieved in interaction. This perspective allows us to see how gender is not only imposed but also actively managed by individuals navigating cultural expectations.

Taken together, Butler and Goffman highlight different but connected dynamics. Performativity shows how gender categories themselves are brought into being and naturalised through repetition; performance shows how individuals, once positioned within these categories, actively negotiate and manage their identities in social contexts.

For gender and development, the distinction matters. Empowerment requires attention both to the constitutive power of discourse (which shapes who counts as a credible subject) and to the interactive dynamics of performance (which reveal how individuals navigate and sometimes subvert the rules). Informal institutions are the bridge: they are the tacit rules, frames, and felicity conditions that make some performances intelligible and others unthinkable. To transform them is to work simultaneously at the level of discourse (performativity) and interaction (performance).

This sets the stage for analysing how masculinities and femininities are performed, reproduced, and contested in everyday life, and how subversive strategies can disrupt hegemonic patterns.

## SUBVERSIVE STRATEGIES: AGENCY OF ACTORS

The analysis of empowerment and informal institutions demonstrates that formal rules alone are rarely sufficient to produce gender equality. Even when women gain access to rights, opportunities, and resources, these can remain hollow if informal rules — the unwritten codes of credibility, loyalty, and respectability — continue to reinforce gender hierarchies. Joan Acker’s (1990, 1992) classic insight that institutions are inherently gendered remains crucial here. She shows that organisations are not simply neutral frameworks in which men and women compete on equal terms; they are built upon and reproduce implicit gender orders. Informal rules shape who speaks, whose voice is taken seriously, how merit is recognised, and which performances of gender are rewarded. In Meyer and Rowan’s (1977) terms, these

rules act as “myths and ceremonies” that legitimise formal structures while sustaining inequalities. Scholars like Cockburn (1985) and Ferguson (1984) have shown that such informal arrangements are deeply embedded in organisational cultures, sustaining male dominance across workplaces, unions, and bureaucracies.

Within such contexts, women often find that agency does not automatically yield empowerment. Instead, their actions are constrained by what Goffman (1974) calls “frames” and “felicity conditions.” Frames are the interpretive schemata that structure meaning — they tell participants what is happening and how to act. Felicity conditions refer to the cultural conventions that govern whether a performance is considered legitimate. Together, these determine whether women’s actions are read as authoritative or inappropriate, whether they count as leadership or as deviance. A woman asserting authority in a parliamentary debate may be read through frames that associate expertise with masculine speech styles; her intervention is thus discounted, even if formally the institution allows her to speak. In this way, informal institutions and felicity conditions often sustain the gap between norm adoption and norm application.

Yet, actors are never entirely without room to manoeuvre. Within these constraints, they develop subversive strategies that attempt to reorganise, layer, or reshape the institutions they inhabit. These strategies show that empowerment is not a linear outcome but an ongoing negotiation, enacted through performance and constantly colliding with the performative reproduction of gender norms.

### ***Reorganising***

The first strategy is reorganising: minor but significant attempts to reconfigure or supplement existing frames so as to create new spaces of subjectivity and action. Brickell (2005) describes this as a process of reframing the predominant definitions of the situation that govern performances. Rather than directly attacking institutions, actors subtly shift the interpretive ground. For example, female bureaucrats may introduce gender-sensitive language into official documents, re-describing issues like domestic violence as public security concerns rather than private family matters. This reorganises the frame in which the issue is understood and opens the door to different policy responses.

Reorganising is often carried out by epistemic communities and femocrats — actors with insider knowledge who strategically shift meanings from within. By embedding feminist concepts into bureaucratic language, they reframe what counts as legitimate policy, sometimes without triggering immediate backlash. At a broader level, reorganising challenges hegemonic masculinity by altering the cultural resources that sustain it, exposing the ways in which power depends on controlling interpretive frames. As West and Zimmerman (1991) argue, gender is “done” through constant interactional accountability; reframing these interactions can destabilise men’s domination and women’s deference.

### ***Layering***

A second strategy is layering, theorised by Mahoney and Thelen (2010). Rather than abolishing existing rules, layering introduces new ones alongside them, gradually shifting institutional logics. This can take the form of gender quotas layered onto existing electoral systems, anti-violence laws layered onto patriarchal legal cultures, or equality clauses layered into constitutions that had long ignored gender. At first, these additions may appear marginal. But their very presence forces reinterpretation: institutions must now reconcile old practices with new rules, and over time the cumulative effect can be transformative.

Layering is particularly useful when veto players are strong and direct reform would trigger resistance. By supplementing rather than replacing, actors reduce the immediate political cost. But layering also carries risks: new rules can be co-opted, turned into symbolic gestures that leave underlying hierarchies

intact. Still, as feminist institutionalists note, layering can buy time and space for coalitions to form, professional norms to evolve, and feminist actors to strengthen their foothold. Incrementalism here is not failure but strategy, recognising the resilience of informal institutions and the need for gradual erosion of their power.

### ***Reshaping***

A third, more ambitious strategy is reshaping institutions and practices. This involves not just supplementing frames but transforming the very division between public and private that sustains gender inequality. Scholars such as Gerson (1993), Pateman (1988), and Phillips (1991) emphasise that without restructuring the private sphere, women's participation in public life will always be constrained. Unequal care burdens mean women must "withhold themselves" from opportunities, while men fill positions that women cannot access due to domestic responsibilities. Cin and Süleymanoğlu-Kürüm (2021) note that reshaping requires men's greater involvement in domestic labour, accompanied by a cultural and institutional commitment to equality in the household.

Reshaping thus aims at a double transformation: empowering women to participate fully in public institutions while simultaneously rebalancing responsibilities at home. It also extends to dismantling patriarchal institutions and replacing them with feminist ones, in line with the call from feminist institutionalists not to adopt an "add women and stir" approach but to create feminist institutions that structurally embed equality. Gender-responsive budgeting, survivor-centred justice systems, and feminist foreign policy frameworks exemplify efforts to reshape not only outcomes but institutional logics themselves.

## **FROM SUBVERSION TO PERFORMANCE AND PERFORMATIVITY**

The discussion of subversive strategies — reorganising, layering, and reshaping — highlights how agency works within and against the informal rules that structure institutions. These strategies are themselves performances: conscious or semi-conscious acts in which actors seek to reposition themselves within gendered hierarchies. Yet their transformative potential can only be understood by situating them in relation to the deeper, constitutive processes of performativity.

Judith Butler (1990, 1993) argues that gender is not a stable essence but a performative effect of discourse. Gender identities are produced through the repetition of stylised acts — gestures, bodily comportment, speech patterns, and institutional rituals — that sediment into what appears to be natural. Importantly, Butler reminds us that performative acts are forms of authoritative speech: in the very act of naming or declaring, they do something, binding subjects into categories (Butler 1993: 225). In this view, gender is not something individuals simply express; it is imposed and reiterated through the discursive frameworks that define intelligibility itself.

This position has been critiqued for underplaying agency and interaction. Butler highlights the discursive conditions of possibility but sometimes neglects how individuals, in their everyday lives, navigate, negotiate, and contest these discursive frames. Here, Erving Goffman's sociological lens becomes indispensable. Goffman (1974) conceives interactions as arenas where individuals actively construct impressions of themselves in relation to others. His notion of frames — schemata of interpretation that help us locate, perceive, and label events — explains how meaning is structured in situ. In gendered terms, frames dictate when a man's assertive speech is read as expertise and when a woman's identical intervention is dismissed as aggression. His idea of felicity conditions further underscores that performances only "work" when they meet cultural expectations of appropriateness.

Brickell (2005) uses Goffman to differentiate performance from performativity. Performance refers to an active subject who “does” gender in interaction — an agent striving to shape impressions. Performativity, in contrast, refers to the constitutive process by which one becomes gendered in the first place, acquiring a subjectivity through repeated acts shaped by discourse. The distinction matters because it clarifies the dual terrain of agency: actors both perform within existing felicity conditions (seeking recognition, legitimacy, or advancement) and simultaneously reproduce or resist the performative logics that make some genders intelligible and others deviant.

This duality explains why informal institutions are so resilient. They operate at both levels. At the level of performance, they dictate how actors must behave in order to be recognised as legitimate: men are expected to embody rationality and authority; women are expected to display warmth, deference, and cooperation. At the level of performativity, they reinforce the very categories of “man” and “woman” as naturalised identities, securing the broader gender order. Thus, women who act authoritatively may be punished not only for breaking performance expectations but for unsettling the performative script itself. They risk being cast into what Connell (1987, 1995) later described as pariah femininity — a stigmatized category reserved for women who embody qualities of hegemonic masculinity, such as assertiveness, competitiveness, or refusal of domesticity.

Agency in this context often requires adopting subversive strategies that challenge both the performance frames and the performative scripts. Reorganising can subtly shift the interpretive frames, allowing new subjectivities to appear as legitimate. Layering can institutionalise alternative rules that, over time, destabilise existing scripts. Reshaping can restructure the very public-private divide that naturalises femininity as domestic and masculinity as public. But none of these strategies is straightforward. As West and Zimmerman (1991) argue in their seminal work *Doing Gender*, every interaction involves accountability: actors are held responsible for aligning with gender expectations, and deviation invites sanction. This is why subversive acts are so fraught — they can be read not as innovation but as deviance, not as empowerment but as failure.

The implications for empowerment are profound. Empowerment cannot be reduced to the acquisition of resources or rights, because informal institutions and performative norms define whether those resources can be meaningfully used. A woman may gain the formal right to run for office, but if party gatekeepers place her in unwinnable districts — a performance of loyalty to hegemonic masculinity disguised as neutral procedure — the right is hollow. Likewise, men may formally be allowed parental leave, but if felicity conditions mark caregiving as “unmanly,” few will take it, leaving the gender order intact.

From this perspective, performance and performativity are not only descriptive concepts but analytical tools for understanding how empowerment unfolds. Subversive performances are the micro-strategies through which actors test the boundaries of felicity conditions. Performativity explains why those boundaries exist in the first place, why some acts are recognised as legitimate and others as unintelligible. Together, they illuminate why gendered inequalities persist even in the presence of progressive laws: because law addresses formal adoption, while performance and performativity govern application.

This is also where masculinities and femininities must be analysed. Connell’s typology of masculinities — hegemonic, complicit, marginalized, subordinate — shows how men, too, are positioned differently within the gender order, often in relation to hegemonic masculinity. Connell (1993: 601) notes that hegemonic masculinity is bolstered or challenged not only in men’s interactions with each other but also through interactions with women. Goffman’s frame analysis helps us see these interactions as arenas where agency and subversion unfold. Subversive strategies, such as women performing “masculine” authority or men



embracing caregiving roles, can reorganise the field of possibilities. Yet they also risk re-inscribing hierarchies if they reinforce the value of hegemonic masculinity rather than dismantling it.

Finally, feminist institutionalism extends this analysis by insisting that gender should not be treated as a tick-box or an add-on — the classic “add women and stir” approach. Instead, institutions must be transformed with feminist consciousness, dismantling and reconstructing the informal rules that naturalise inequality (Mahoney & Thelen 2010). In this vision, subversive strategies are not isolated acts but part of a broader project to create feminist institutions: organisational orders in which alternative performances are not marginal but normal, and in which performativity itself produces equality rather than hierarchy.

In sum, the movement from subversion to performance and performativity is not a shift in topic but a deepening of the analysis. Empowerment strategies cannot be understood without recognising the performative reproduction of gender; subversive performances cannot succeed without reshaping felicity conditions; and feminist transformation cannot occur without dismantling the informal institutions that naturalise masculinity as authority and femininity as deference. This sets the stage for exploring masculinities and femininities in detail — not as fixed categories but as dynamic, contested performances that sustain or subvert the gender order in both development and institutional contexts.

## MASCULINITIES AND FEMININITES: PERFORMANCE, PERFORMATIVITY AND SUBVERSION

Having traced how empowerment collides with informal institutions, and how performance and performativity together reveal the persistence of gender orders, we can now turn to how these dynamics crystallise in the construction of masculinities and femininities. Here the task is not simply to catalogue different gender roles but to understand how they are produced, valued, and contested in interaction, and how they shape possibilities for subversion and empowerment.

Raewyn Connell’s (1987, 1995) typology of masculinities remains the most influential framework for grasping these dynamics. Hegemonic masculinity refers to the culturally dominant form of masculinity at a given moment: not necessarily the most common, but the most esteemed, the standard against which other masculinities are measured. It is closely tied to heterosexuality, whiteness, rationality, physical strength, and the suppression of emotions such as sadness. Complicit masculinity describes men who may not embody all these traits but who nonetheless benefit from, and do not challenge, the gender order structured around hegemonic masculinity. Marginalised masculinities characterise men excluded from hegemonic ideals by race, class, or disability, yet who may still adopt norms of aggression, competitiveness, or emotional suppression. Subordinate masculinities are those explicitly devalued for embodying “feminine” traits: effeminacy, homosexuality, emotional expressiveness. Connell reminds us that these forms are relational — hegemonic masculinity is constituted not only in contrast to other masculinities but also through interactions with femininities (Connell 1993: 601).

Building on Connell, scholars have explored further dimensions. Coles (2007) speaks of multiple dominant masculinities coexisting and competing, while Hooper (2001) shows how international politics has been infused with what she calls the “citizen warrior masculinity,” centred on aggressiveness, militarism, and materialist accumulation of power. This combat paradigm, or what Kronsell calls the “masculine-warrior” model, contrasts with a bourgeois-rational masculinity that is more egalitarian and less aggressive, but still privileges intellectual independence and economic cultivation. Diplomacy offers a telling case: Neumann’s research on the Norwegian foreign ministry shows that hegemonic bourgeois masculinity — refined, rational, cosmopolitan — defined the profession, while more unconventional masculinities were cast as troublesome, and feminised functions of diplomacy were relegated to the unpaid labour of

diplomatic wives. Feminisation here was not about inclusion but about the relegation of certain tasks to “support roles,” marking them as unsuitable for “real” diplomacy.

Other scholars have tracked hypermasculinity (Mosher & Sirkin 1984), defined by callous sexual attitudes toward women, the belief that violence is manly, and the pursuit of danger as exciting. Ali Bilgiç critiques this in international politics as a “barbaric” masculinity, too violent and aggressive to sustain long-term legitimacy. Hypermasculinity illustrates the performative extremes of gender: exaggerated performances that reinforce not only dominance over women but also hierarchies among men.

But masculinity is not only reinforced; it can also be challenged or reappropriated. Women sometimes strategically distance themselves from stereotypical femininity by adopting hegemonic masculinity to claim authority in male-dominated fields. This form of female stereotype reactance (Naurin et al. 2019) manifests in women adopting harsher, less cooperative styles to resist being stereotyped as deferential. Connell (2005) calls this pariah femininity: the demonisation of women who embody traits of hegemonic masculinity, such as assertiveness or competitiveness. Peachter (2018), however, critiques this formulation for making femininity entirely relational to masculinity, arguing instead for the possibility of recognising hegemonic femininity in its own right.

Indeed, femininities also exist in plural forms. Stereotypical femininity involves performing traits culturally coded as feminine: emotional expressiveness, passivity, warmth, cooperation. Such performances can sometimes generate limited advantages — benefiting from male chivalry, for example — but they ultimately reinforce women’s subordination. Hyperfemininity exaggerates these traits to the point of disempowerment, positioning women as reliant on male protection. Hegemonic femininity, as theorised by Schippers (2008: 94), consists of the culturally valued traits that complement and legitimate hegemonic masculinity, securing male dominance while rewarding women who conform. Yet Schippers also opens space to think of femininities as powerful in their own right, not only as subordinates to masculinity. Men enacting subordinate masculinities can even perform hegemonic femininity — embodying emotionality, care, or passivity in ways that invert the expected hierarchy, though usually at significant social cost.

Cultural shifts have also produced new masculinities that challenge or at least diversify the hegemonic script. The “new man” of the 1980s was defined by his rejection of sexism, his willingness to embrace sensitivity, caregiving, and even domestic roles. Though the discourse faded in the 1990s, it has since resurfaced, often linked to pro-feminist or egalitarian movements. Similarly, the “metrosexual,” coined by Mark Simpson in 1994, described urban men who invest heavily in grooming, fashion, and consumption, blending masculinity with traits stereotypically coded as feminine. These examples reveal how market forces and cultural industries shape gender performances, sometimes opening cracks in the hegemonic order, sometimes commodifying difference.

The point, however, is not to create a typology for its own sake. It is to understand how agency and subversion operate within these gendered scripts. Actors can engage in reorganising existing frames, subtly shifting the meaning of masculinity or femininity; reframing dominant definitions, as when feminist epistemic communities insist that aggression is not strength but insecurity; layering new practices onto old institutions, creating hybrid gender orders; or reshaping the division of labour itself, encouraging men’s deeper involvement in domestic work and women’s entry into public leadership (Gerson 1993; Pateman 1988; Phillips 1991). These strategies expose how masculinities and femininities are both performed in interactions (Goffman’s level of performance) and constituted through discourse (Butler’s level of performativity).

What matters for development and feminist epistemic justice is not merely cataloguing these masculinities and femininities but interrogating the power relations they sustain. Hegemonic masculinities and hegemonic femininities structure the tacit rules of informal institutions, shaping who is credible, who is authoritative, and who is silenced. Subversive strategies — whether through pariah femininities, new masculinities, or feminist institutional reforms — seek to destabilise these hierarchies and expand the range of intelligible performances. Yet such efforts are always contested. They may be co-opted, as when market logics turn subversion into consumer trends, or resisted, as when nationalist discourses frame feminist or LGBTQI+ identities as foreign impositions.

In short, masculinities and femininities are not static categories but ongoing sites of performance, performativity, and contestation. Understanding them in this way links back directly to the earlier themes of empowerment and informal institutions. Empowerment falters when only certain masculinities and femininities are intelligible within institutions, and when others are punished as deviant. It deepens when subversive performances destabilise hegemonic scripts, making space for feminist reinterpretations of what counts as authority, care, or strength.

## SUBVERSIVE STRATEGIES OF GENDERED AGENCY

If hegemonic masculinities and femininities reproduce inequality through repeated performances, then subversion requires interventions into those performances. Actors — whether individuals, movements, or epistemic communities — rarely overturn gender orders in one decisive break. More often, they employ incremental, situated strategies that chip away at hegemonic norms while carving out new subjectivities and possibilities for action. Four such strategies can be identified: reorganising, reframing, layering, and reshaping.

### ***1. Reorganising: Minor Shifts in Frames***

Reorganising refers to small-scale adjustments within existing cultural and institutional “frames” (Goffman 1974). These adjustments do not abolish dominant scripts but subtly redirect them, allowing alternative identities and behaviours to surface. Brickell (2005) emphasises how such attempts open up new forms of subjectivity and social action, without necessarily overthrowing hegemonic masculinity.

Example in politics: A parliamentary committee reorganises its speaking order so that women chairpersons speak first and last, disrupting the tacit rule that men set the tone. The frame of authority remains intact, but its enactment shifts.

Example in development practice: Microfinance programmes that initially targeted men are reorganised to include women, creating space for new performances of economic agency.

Mechanism: Agency exploits openings within existing frames, creating micro-performances that destabilise the sense of inevitability surrounding hegemonic roles.

### ***2. Reframing: Redefining the Situation***

Reframing goes further by altering the definitions of the situation that govern performances (Brickell 2005). This strategy explicitly challenges what counts as legitimate masculinity or femininity, aiming to redistribute symbolic authority.

Conceptual basis: West and Zimmerman (1991) show how gender is an “accomplishment” performed within normative expectations. Reframing contests those expectations, asking participants to interpret behaviours differently.

Example in activism: Domestic violence reframed from a “private matter” to a “public wrong,” compelling states to legislate and fund survivor-centred services.

Example in diplomacy: Feminist epistemic communities (femocrats) reframe “security” not as territorial defence but as freedom from gender-based violence, drawing on UNSCR 1325.

Mechanism: Reframing destabilises hegemonic definitions at the macro-level by altering what counts as credible knowledge, forcing institutions to confront alternative interpretations.

### ***3. Layering: Adding New Rules onto Old Ones***

Mahoney and Thelen (2010) describe layering as the introduction of new rules alongside existing ones, gradually reshaping institutions without frontal assault. Layering allows actors to build footholds that can be expanded over time.

Example in law: Gender quotas in party lists layered onto existing electoral systems. While informal gatekeeping often persists, quotas provide new leverage for women’s entry into politics.

Example in the workplace: Diversity training layered onto entrenched hiring practices. Though superficial at first, these layers can create networks of accountability that accumulate into institutionalised change.

Mechanism: Layering thrives in contexts where veto players are strong. By adding reforms incrementally rather than replacing rules outright, it lowers resistance and allows feminists to organise within the cracks of the system.

### ***4. Reshaping: Transforming Institutions and the Private Sphere***

Reshaping is the most ambitious strategy. It seeks to restructure not only public institutions but also the private sphere that sustains them. Gerson (1993), Pateman (1988), and Phillips (1991) all insist that without equalising domestic labour, public equality remains hollow. Cin & Süleymanoğlu-Kürüm (2021) underline how unequal household responsibilities drive women to withhold themselves from professional opportunities, leaving men to occupy positions “not filled by women.”

Example in family policy: Expanding paternity leave and normalising men’s involvement in caregiving reshapes cultural expectations, reducing the penalty women face for professional advancement.

Example in politics: Gender mainstreaming not only adds women into decision-making (an “add women and stir” model) but reshapes agendas themselves — prioritising care, social protection, and anti-violence measures.

Mechanism: Reshaping requires deep cultural work. It confronts felicity conditions (the cultural norms that determine which performances are recognised as valid) and seeks to transform them so that alternative gendered subjectivities are not only intelligible but legitimate.

Each of these strategies reveals how agency operates within the dual logics of performance and performativity. Actors “do” gender in interactions (performance) but also reconstitute the very norms that define what gender is (performativity). Subversion, therefore, is not a one-off rupture but a series of strategic interventions across levels: micro-interactions, institutional designs, cultural discourses.

The stakes are high. Without such strategies, women’s empowerment risks being “empowerment lite” — rights on paper without shifts in practice. With them, even incremental changes can accumulate into transformations of informal institutions and open space for feminist reinterpretations of authority, care, and equality.

## VIDEO RESOURCES

To complement the theoretical discussion of agency, performativity, and the construction of masculinities and femininities, the following videos provide accessible yet rigorous perspectives on the issues. They help translate abstract debates—such as Judith Butler’s idea of performativity or Connell’s theorisation of masculinities—into concrete and relatable examples. Together, they offer insights into how gender is enacted, maintained, and sometimes subverted in everyday life and institutional contexts.



[Judith Butler: Your Behavior Creates Your Gender | Big Think \(2011\)](#)

This short video introduces Butler’s central claim that gender is not a stable identity but is produced and reproduced through repeated acts. The video is particularly effective in illustrating the idea of performativity as an ongoing process rather than a fixed trait, which makes it a useful complement to classroom discussions on the distinction between “performance” and “performativity.”

[Berkeley Professor Explains Gender Theory | Judith Butler \(2016\)](#)

Here, Butler reflects more broadly on her contributions to gender theory, situating performativity within wider debates about identity, power, and social norms. The video highlights how discourse categorises individuals and shapes possibilities for agency, linking directly to the lecture’s focus on informal institutions and epistemic constraints.

[Prof. Raewyn Connell – Making Sense of Men and Masculinities \(2015\)](#)

Connell outlines the concept of hegemonic masculinity, explaining how certain forms of masculinity are culturally elevated while others are marginalised or subordinated. This video helps ground theoretical definitions in real-world examples, clarifying how masculinities are produced relationally and how they reinforce or contest institutional gender orders.

[Lecture 41: Hegemonic Masculinity: Rethinking the Concept \(2017\)](#)

This lecture expands on Connell and Messerschmidt’s work by critically reassessing the concept of hegemonic masculinity. It explores the multiple forms masculinities can take—hegemonic, complicit, marginalised, and subordinate—and their shifting relations over time. The material is especially relevant to understanding gendered hierarchies within institutions and how informal practices sustain them.

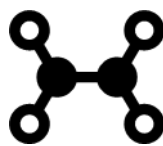
[Claire Duncanson – Men in Movement: Hegemonic Masculinity and the Possibility of Change \(2018\)](#)

Duncanson examines how masculinities are mobilised and transformed within social and political movements, particularly in peacebuilding and international relations. The video highlights how “citizen warrior” masculinities are challenged or reproduced, offering students an entry point into questions of subversion, agency, and institutional transformation.



## STUDY QUESTIONS

1. Using Goffman and Butler, analyze a concrete interaction (e.g., a seminar, committee meeting, or press conference) where gendered authority was negotiated. What were the relevant frames and felicity conditions, and how did repeated acts constitute who counted as a credible speaker?
2. Identify a policy arena (courts, policing, party politics, or workplaces) where formal rights exist but outcomes remain unequal. Map the performative constraints that persist (credibility deficits, respectability norms, “masculine” styles of authority) and explain why resources alone did not yield empowerment.
3. Evaluate one subversive tactic—reorganising, reframing, layering, or reshaping—in a specific institution you know (university, NGO, ministry, company). What micro-performances made it possible? What veto players or felicity conditions limited it? Did it produce selective, positive, or merely “empowerment lite” change?
4. Using Connell’s typology (hegemonic, complicit, marginalised, subordinate) and Schippers’ account of hegemonic femininity, analyze how a development or diplomatic setting codes desirable behavior. Which masculinities/femininities are rewarded or sanctioned, and where do you see openings for subversion without re-centering hegemonic masculinity?



## GENDER EQUALITY AND EDUCATION

The previous chapter's discussions centred on empowerment, informal institutions, and the performative dimensions of gender. We saw how formal commitments to equality—whether in politics, the labour market, or diplomacy—often encounter resistance in informal institutions, where entrenched norms, practices, and performances continue to reproduce gender hierarchies. We also highlighted how empowerment is not a static outcome delivered by policies but a continuous struggle, shaped by the interaction of formal rights and informal constraints, as well as by the ways gender itself is performed and contested in everyday life.



This transition brings us directly to education. Education is not only one of the most important policy arenas where empowerment is shaped, but also a site where epistemic justice and injustice become visible. Feminist epistemic justice reminds us that knowledge systems are never neutral: they privilege certain ways of knowing and marginalise others. Schools and universities transmit not just skills and information, but also social values and hierarchies, determining whose voices, histories, and experiences are deemed legitimate. In this sense, education is deeply connected to both testimonial justice (whose voices are heard and believed) and hermeneutical justice (whose experiences are named and made intelligible).

The international frameworks on education equality—from Jomtien to Beijing, from Dakar to the Sustainable Development Goals—must therefore be read not only as development agendas but also as attempts to redress epistemic injustices on a global scale. These frameworks are about more than access: they set the parameters of whose knowledge is valued, how gender roles are taught and reinforced, and whether education systems empower students to challenge rather than reproduce social inequalities.

The 1990 Jomtien World Conference on Education for All marked a turning point by adopting an expanded vision of basic education and committing fully to the principle of “Education for All” (EFA). It was underpinned by international human rights frameworks such as the Universal Declaration of Human

Rights and the Convention on the Rights of the Child, both of which frame education as a right rather than a privilege. This rights-based grounding is crucial from an epistemic justice perspective, as it establishes that exclusion from education is not only a developmental failure but also an injustice that silences voices and withholds recognition.

Building on this, the 1995 Beijing Platform for Action (adopted at the Fourth UN World Conference on Women) made gender equality in education a central concern. It stressed that primary education provides the foundation for a lifetime of learning and insisted on universal access and completion for both girls and boys. Here again, the epistemic justice dimension is clear: Beijing not only pushed for girls' access to school but also linked education to broader transformations in agency, participation, and equality in public and private life.

The 2000 Dakar Framework for Action articulated the six EFA goals, including early childhood care, universal primary education, the meeting of learning needs, adult literacy, gender parity, and quality improvement. Each goal underscores that access must be equitable and outcomes must be transformative. For example, Goal 5 explicitly targeted the elimination of gender disparities in primary and secondary education by 2005 and gender equality in education by 2015. Yet as feminist scholars remind us, parity in enrolment does not automatically translate into empowerment if curricula continue to reproduce stereotypes, if girls are channelled into feminised vocational tracks, or if school environments remain hostile or unsafe. Thus, the Dakar agenda highlights the importance of measuring not only numbers but also the qualitative dimensions of learning, safety, and recognition.

The 2030 Sustainable Development Goals (SDGs), particularly SDG 4, took this agenda further by embedding education in the broader sustainable development framework. SDG 4 commits to ensuring inclusive and equitable quality education and promoting lifelong learning opportunities for all. Its specific targets—such as universal primary and secondary completion (4.1), access to early childhood education (4.2), equal access to tertiary education (4.3), skills for employment (4.4), and the elimination of gender disparities (4.5)—all reflect a concern with both access and outcomes. Importantly, targets such as 4.7 go beyond formal schooling to include the acquisition of knowledge and skills for sustainable development, gender equality, and global citizenship, directly linking education to epistemic justice. They seek to broaden interpretive resources so that learners can name, understand, and resist injustice in their own contexts.

When viewed together, these frameworks illustrate a progressive expansion in how education is conceptualised—from access and literacy toward empowerment, equality, and sustainability. They also reveal a persistent tension: while rights and goals are formally adopted, application on the ground is uneven, often limited by informal institutions, cultural norms, and resource constraints. This parallels our earlier discussions of Europeanisation, conditionality, and lesson-drawing: adoption matters, but application determines whether reforms transform lived realities.

For the EU and beyond, gender equality in education remains both a development goal and an epistemic justice project. Policies that increase girls' access to schools must also interrogate what knowledge is being taught, whose histories are being centred, and how classrooms reproduce or challenge power relations. Without addressing these deeper questions, even the most ambitious international commitments risk becoming “empowerment lite”: progress in numbers without redistribution of knowledge, authority, and agency.

## THE EU DIMENSION: GENDER AND EDUCATION

While global frameworks such as Jomtien, Beijing, Dakar, and the SDGs have set ambitious agendas, the European Union has developed its own set of tools and initiatives that align with, but also shape, international education policies. In EU discourse, education is not only about skills and employability but also about fostering democratic citizenship, promoting social inclusion, and reducing gender inequalities. From a feminist epistemic justice perspective, this is significant because it expands the terrain of education beyond economic growth, highlighting questions of participation, recognition, and representation.

One of the most visible instruments has been Erasmus+, the EU's flagship programme for education, training, youth, and sport. Originally launched in 1987 as a student exchange scheme, Erasmus+ has grown into a major funding mechanism supporting mobility, partnerships, and educational reform across Europe and beyond. Gender equality is not always foregrounded in Erasmus+ documents, but the programme's emphasis on inclusivity, access, and intercultural dialogue provides important entry points for advancing feminist agendas. By enabling young women to study abroad, Erasmus+ expands not only their resources and opportunities but also their epistemic agency—the ability to produce, share, and validate knowledge across borders. Yet, inequalities remain in access: mobility opportunities often favour students from middle-class backgrounds, and gender stereotypes can still shape which disciplines women and men choose.

The EU has also integrated gender equality into broader education and research strategies. For example, Horizon 2020 and its successor Horizon Europe explicitly require gender equality plans in research institutions as a condition for funding. This marks a significant step toward institutionalising gender-sensitive practices in higher education and research. From the perspective of epistemic justice, such measures matter because they aim not only at gender balance in staffing but also at changing the production of knowledge itself—ensuring that women's perspectives, feminist theories, and intersectional approaches are recognised as legitimate and necessary in scientific and academic contexts.

At the policy level, the EU has repeatedly stressed education as a cornerstone of gender equality strategies. The European Gender Equality Strategy 2020–2025 links education to breaking gender stereotypes, addressing digital divides, and promoting women in STEM (science, technology, engineering, and mathematics). The strategy acknowledges that while women often outperform men in higher education enrolment overall, they remain underrepresented in technical fields and overrepresented in lower-paid sectors, reflecting broader labour market inequalities. Tackling these disparities requires not only formal measures but also a transformation of the cultural and epistemic environment in which young women and men make their educational choices.

EU institutions also draw explicitly on global frameworks. The commitment to SDG 4 has been integrated into the European Education Area (EEA) initiative, which seeks to ensure that by 2025 all young Europeans have access to high-quality, inclusive education and training. The EEA explicitly frames gender equality as part of inclusive education, highlighting the need to address early school leaving among boys, gendered subject segregation, and barriers faced by girls with migrant or minority backgrounds. These concerns echo the SDG's call to eliminate disparities not only between men and women but also across class, ethnicity, and other intersecting axes of inequality.

Yet, much like the global picture, the EU faces an adoption–application gap. Directives and strategies commit to gender equality in education, but informal institutions within member states—classroom practices, teacher expectations, curriculum content, peer cultures—can continue to reproduce stereotypes. Feminist scholars have shown how textbooks often portray women in domestic roles and men as leaders, how teachers unconsciously call on boys more often in science classes, and how girls face



harassment in schools that undermines their participation. These practices reflect the persistence of testimonial and hermeneutical injustices within education systems: girls' voices are less likely to be heard, and their experiences of marginalisation may not even be recognised as problems within prevailing interpretive frameworks.

For this reason, feminist epistemic justice pushes us to evaluate EU and international commitments not just in terms of enrolment numbers or graduation rates but also in terms of epistemic outcomes. Are girls and women empowered to contribute to knowledge production? Are curricula inclusive of feminist, postcolonial, and decolonial perspectives? Do classrooms foster the interpretive resources necessary to name and challenge gender-based harms? These questions shift the focus from access to transformation, reminding us that education must do more than count students—it must change the conditions under which knowledge is produced, shared, and validated.

## APPROACHES TO GENDER EQUALITY IN EDUCATION

For a long time, policy debates and international frameworks on education focused on gender parity as the main way to measure progress. In this view, gender equality was understood as a numerical balance between the participation of boys and girls. If enrolment rates looked the same, or if equal numbers of girls and boys appeared in classrooms, the assumption was that equality had been achieved. This approach was attractive because it offered clear, quantifiable indicators that could be easily compared across countries and monitored over time. Reports could show, for instance, whether the ratio of girls to boys in schools had reached 1:1, or whether the gap in literacy rates between adult men and women had narrowed.

However, as important as these benchmarks are, they remain incomplete. Gender parity is primarily about quantity: it can tell us how many girls and boys are in school, but not what happens to them once they are there. It does not capture whether girls feel safe in classrooms, whether boys and girls have equal chances to succeed, or whether the curriculum challenges or reinforces gender stereotypes. It does not reveal how social norms—about marriage, domestic labour, masculinity, femininity, or authority—shape students' educational experiences. In other words, parity is a starting point, but gender equality in education is about more than numbers.

This recognition has led to a shift in recent years towards understanding gender equality as a relational process. Educational systems are not neutral spaces. They are built upon, and constantly reproduce, norms and values about gender. These norms are institutionalised in teaching methods, textbooks, disciplinary practices, and even in the allocation of resources. To analyse equality, then, one must ask not only whether girls and boys are present in schools but also how education itself produces, sustains, or challenges gender hierarchies.

To make this analysis concrete, gender equality in education can be approached from three perspectives:

- Rights to education
- Rights within education
- Rights through education

### Rights to Education: Measuring Gender Parity

The first perspective is rights to education. Here, the question is whether all children, regardless of gender, have equal access to schooling. This is the domain where parity has traditionally been emphasised. Access is measured by enrolment numbers, attendance, survival through grades, and completion rates.



At the most basic level, gender parity means that boys and girls are equally represented in education. For example, if 95 percent of boys in a given country are enrolled in primary school, parity would require that roughly the same percentage of girls are also enrolled. This approach has been particularly important in many African and Asian countries, where strong efforts over the last few decades have raised girls' enrolment levels to match those of boys, especially at the primary level.

But here the crucial question arises: does gender parity mean gender equality? The answer is no, at least not by itself. Parity shows us who enters school, but it does not show us who thrives there. It does not capture whether girls are pushed into early marriage and drop out despite having been enrolled. It does not reveal whether boys are channelled into technical fields while girls are directed toward domestic sciences. Nor does it show whether schools are safe environments or whether they reproduce patriarchal hierarchies through teacher expectations, peer interactions, or disciplinary practices.

This is why gender parity must be seen as necessary but insufficient. It provides a baseline for understanding access but says little about the quality of participation or the outcomes that education delivers for different groups.

### Indicators of Gender Parity

- A variety of indicators are typically used to measure rights to education and gender parity:
- Enrolment rates: the number of boys and girls entering and remaining in education at different stages.
- Survival rates: the proportion of students, disaggregated by gender, who make it to grade 5 (or another benchmark), which also reveals dropout patterns.
- Attendance: how regularly boys and girls are present in school, recognising that irregular attendance often reflects gendered labour responsibilities at home.
- Repetition rates: the number of students repeating years of schooling, which can signal structural inequalities in teaching or expectations.
- Average years of schooling: the total number of years that boys and girls complete, providing an aggregate measure of access and retention.
- Transitions between levels: whether boys and girls progress equally from preschool to primary, primary to secondary, and secondary to tertiary or vocational education.
- Teacher composition: the number of male and female teachers, which can affect representation, mentoring, and the role modelling available to students.
- Literacy levels: literacy rates among boys and girls, as well as adult men and women, which reflect both current access and the legacies of past inequalities.

These indicators provide a picture of who is in school, how long they stay, and whether they complete different levels of education. They also reveal patterns of exclusion—such as when girls leave school earlier than boys due to child marriage, or when boys drop out to join the labour force.

Yet, despite their usefulness, these indicators do not capture the lived experience of schooling. They tell us little about classroom dynamics, the gendered division of subjects, or the power relations that play out between students and teachers. For this reason, the newer perspectives—rights within education and rights through education—are essential to build a fuller understanding of equality.

### **Rights within Education**

When we move beyond the question of access to education and the numerical measurement of gender parity, the focus shifts toward the quality and experience of education itself. This is what is captured under the category of rights within education. It refers to the right of men and women, boys and girls, to non-

discrimination in their educational opportunities once they are already within the system. This means that equality must extend beyond simply being admitted to school and must be visible in the content, methods, interactions, and outcomes that shape the educational journey.

The emphasis here is on equality and quality. Educational institutions should function in ways that do not reproduce or maintain gender stereotypes, nor should they impose institutional barriers that limit the opportunities available to students based on their gender. In other words, rights within education relate to equality of treatment, which in turn is reflected in equality of outcome. This goes far deeper than formal access—it engages with the lived processes of schooling and the relational inequalities that can persist even in systems that appear inclusive on the surface.

### **Core Areas of Focus**

- Several interrelated dimensions define rights within education:
- Learning content: The curriculum, textbooks, and teaching materials shape perceptions of gender roles. Content that depicts men as leaders, scientists, and professionals while portraying women in narrow domestic roles reinforces stereotypes and curtails the imaginative possibilities for both boys and girls.
- Teaching methods and processes: Classroom practices influence how students perceive themselves and their abilities. Teachers may—consciously or unconsciously—encourage boys to participate more actively in discussions, or assume that girls are more suited for certain subjects. These dynamics are subtle but powerful in structuring gendered outcomes.
- Subject choice: One of the most visible markers of inequality within education is the persistence of gendered patterns in subject specialisation. Girls may be directed toward teaching, nursing, or the humanities, while boys are pushed into science, technology, or engineering fields. Whether such choices are genuine or imposed through institutional and cultural expectations becomes a central question.
- Assessment modes: How students are evaluated can reproduce inequalities. Examinations and grading practices may reward assertive behaviours or particular cognitive styles often associated with masculine norms, marginalising other forms of knowledge and expression.
- Management of peer relationships: Schools are key sites where social norms are learned and enacted. The dynamics of peer relationships—whether inclusive or discriminatory—affect how students experience education, with gender often intersecting with other axes of difference such as class, ethnicity, or disability.
- Learning outcomes: Ultimately, equality within education must be measured by outcomes. Do boys and girls achieve equally in terms of grades, literacy, and progression to higher levels of education? Or do gaps persist, reflecting underlying inequities in the processes of schooling?

### ***Indicators of Inequality***

- To make these inequalities visible, a range of indicators are used. These include:
- Performance in examinations: To what extent do girls and boys convert educational access into educational capital? How are their performances shaped by biases within the system?
- Subject choice and specialisation: Do girls and boys gravitate toward or get channelled into particular fields, and are these linked to institutionalised gender norms? For example, the overrepresentation of women in teaching professions may reflect not free choice but structural steering.
- Contextual interpretations of ‘choice’: What appears as choice may in fact be constraint. Families, communities, and schools all exert pressures that influence what options are considered possible or desirable.
- Persistence of gender stereotypes: Educational institutions often impose subtle barriers by presenting certain paths as “naturally” male or female. These stereotypes limit the range of futures students can imagine for themselves.

## ***Broader Determinants***

- Rights within education are not confined to what happens inside the classroom. They are also shaped by broader family and social factors:
- Teacher behaviour and home variables: The influence of teacher expectations, as well as family responsibilities—such as girls' disproportionate share of household labour—affects learning outcomes.
- Social discrimination: Inequalities of race, caste, class, and ethnicity deepen gendered differences, creating compounded disadvantages for some students.
- Multiple discrimination: Girls, in particular, are often subject to intersecting forms of exclusion that go beyond gender alone, producing varied experiences of the learning process even within the same school environment.

The analysis of rights within education makes clear that achieving gender equality requires much more than closing enrolment gaps. True equality must be reflected in the everyday experiences of learners: in what they are taught, how they are taught, how they interact with peers and teachers, and what outcomes they can achieve. Without this focus on quality and equality, formal gains in access risk masking the persistence of deeper inequities.

## ***Rights within Education***

The idea of rights through education shifts our focus beyond the classroom. Whereas rights within education deal with fairness, inclusion, and equal treatment in the educational setting, rights through education ask a broader question: to what extent does education strengthen gender equality outside the sphere of education itself? This perspective recognises that education does not exist in isolation but functions as a critical driver of empowerment across multiple spheres of life.

Gender equality within education is shaped by, and simultaneously shapes, rights and gender equality in other domains — the labour market, political participation, public life, and even the private sphere of family and household dynamics. For example, when girls gain access to high-quality, non-discriminatory education, they are more likely to enter the labour force, participate in civic life, and challenge restrictive gender norms. Education equips them not only with skills but with symbolic and social capital that redefines their place in society.

The importance of rights through education becomes most evident when we consider persistent inequalities outside of the school system. Women continue to face structural barriers in employment, wage equality, leadership roles, and political representation. Education is often framed as the key mechanism to overcome these gaps — but the relationship is not automatic. Access to schooling does not always translate into equal opportunities in the labour market or politics. Instead, education interacts with wider informal institutions, cultural expectations, and labour market structures that can either enable or constrain the transformative potential of women's learning.

This raises a central question: how far can education function as a lever for social change? In contexts where patriarchal norms remain strong, education can empower women with knowledge and voice, yet social expectations may continue to limit their ability to act on these rights. Conversely, in societies where institutional reforms accompany education — for example, strong anti-discrimination laws, affirmative action policies, or inclusive labour market practices — the effects of education are amplified.

Thus, rights through education underscore the interconnectedness of equality in education and equality in life more broadly. They remind us that achieving gender justice requires not only equitable access to classrooms but also ensuring that what is learned and achieved there translates into substantive

opportunities in employment, public participation, and personal autonomy. Education, then, becomes both a site of equality and a pathway toward it.

The concept of rights through education highlights the ripple effects that education produces beyond the classroom. While rights within education ensure equal treatment in the school environment — equal access, fair curricula, non-discriminatory teaching methods — rights through education ask whether these educational experiences actually enable gender equality in broader social, economic, and political life.

This perspective is crucial because education is not just about transmitting knowledge; it is about enabling capabilities. When education opens pathways to employment, political voice, and social recognition, it becomes a mechanism for dismantling entrenched inequalities. However, when access to education is restricted by poverty, geography, or cultural norms — or when education itself reproduces stereotypes — its capacity to generate rights through life is diminished.

## THE EUROPEAN UNION CONTEXT

In the EU, the evolution of education policy demonstrates how rights through education were linked to broader economic and political projects.

- 1958–1993: Transgovernmental cooperation largely focused on vocational education, with little direct attention to gender equality. Yet, vocational training was already understood as a stepping stone to labour market participation, making women's access to it a question of rights beyond the school.
- 1993–1999: Maastricht Treaty era marked the formalisation of EU education policy. While the Treaty itself focused on the Single Market, education began to be framed as a means of shaping a European identity. For women, this meant that equality in education could translate into equality in citizenship, tying personal development to collective belonging.
- Post-1999: Bologna Process and Lisbon Treaty of 2009 introduced a more direct recognition of rights through education. The Bologna Process created the European Higher Education Area, standardising quality and mobility, and explicitly tied education to values of gender equality, tolerance, and democratic participation. Under the Lisbon Strategy, education was cast as a tool for human capital development, seen as critical for economic growth and social cohesion. Here, gender equality in education was explicitly linked to labour market competitiveness and empowerment, showing a clear articulation of rights through education.

Thus, in the EU context, rights through education were institutionalised both as economic imperatives and as civic values. Women's inclusion in higher education was not only about fairness in access but also about shaping a workforce and citizenry capable of participating equally in European integration.

## THE TURKISH CONTEXT

Turkey offers a vivid example of how education reform can function as a gateway to gender equality beyond schooling.

The Eight Years of Compulsory Education Reform (1997), supported by the World Bank, sought to prevent families from pulling daughters out of school after year 5. Measures such as free meals, transportation, and health services were designed to reduce socio-economic barriers. These reforms illustrate rights through education: by keeping girls in school longer, the state was not only equalising classroom opportunities but also enabling future participation in the labour market and public life.

The Scholarship for Girls (1997), spearheaded by the Association in Support of Contemporary Living (ÇYDD), arose in response to demands from local governors. This initiative not only raised enrolment rates

(from 78.9% for girls in 1997 to 87.9% in 2007) but also translated into higher retention in secondary schooling. In effect, it created pathways for women into higher education and employment, showing how targeted support can extend the effects of education beyond the classroom.

During the 2000s, EU accession negotiations further shaped Turkey's educational agenda. IPA funds (since 1999) financed campaigns such as "I have a daughter in Anatolia and she will be a teacher" and "Snowdrops" (Kardelenler), which promoted equal opportunities particularly for rural girls. The Girls' Education Campaign (2003), co-led by MoNE and UNICEF, mobilised NGOs and private donors to raise enrolment in Eastern Turkey. These initiatives reflect rights through education in action: by tackling socio-economic and cultural barriers, they aimed to ensure that education enabled mobility, employability, and empowerment.

The Support for Basic Education Programme (SBEP, 2002–2007), co-financed with the EU, targeted curriculum reform, teacher training, and gender-sensitive textbooks. This shows another pathway of rights through education: not just keeping girls in school, but reshaping educational content so that women's access to the labour market and public sphere is not undermined by persistent stereotypes.

Civil society and "femocrats" also played a major role. The "Daddy, Send Me to School" campaign (2005) and later projects such as the Project for Promoting Gender Equality in Education (ETCEP, 2011–2016) developed gender-sensitive school standards and curricula. These efforts further illustrate that rights through education require changes in both access and content if education is to open genuine opportunities in employment and political representation.

These examples show that rights through education are about much more than the classroom. They involve a double transformation: first, removing barriers that prevent girls and women from entering and remaining in school, and second, ensuring that what they learn equips them to participate equally in economic, social, and political life. In both the EU and Turkey, education has been framed as a lever of empowerment, but the degree of success depends on how policies engage with informal norms, structural inequalities, and broader socio-political reforms.

Education, in this sense, is not simply a right in itself but a multiplier of rights — a means through which women can claim equality in employment, voice in politics, and recognition in public life.



## VIDEO RESOURCES

To deepen our discussion on rights through education, we will complement the lecture with a series of short videos. These resources bring theoretical concepts into conversation with lived realities, offering perspectives from international organizations, teachers, activists, and students themselves. By engaging with them, you will be able to connect abstract debates about gender equality and education with concrete initiatives, policies, and classroom practices across different contexts. As you watch, consider how these videos illustrate the relational nature of gender equality in and through education, and think critically about the extent to which education has transformative potential beyond the school walls.



### Promoting Gender Equality Through Education:

AUN DESA — this video links SDG 4 (quality education) and SDG 5 (gender equality).

This short UN video explains how quality education (SDG 4) is interlinked with gender equality (SDG 5). It highlights global policy frameworks, statistics on gender disparities, and specific programs aimed at empowering girls. It is particularly useful to understand the international development perspective and the emphasis on education as a global human right.

### Empowering Education: Teachers Reflect on Gender Equality... — teachers discuss how gender equality plays out in classrooms, which ties into your “rights within” and “rights through” education angles.

In this resource, teachers from different contexts share experiences of integrating gender-sensitive pedagogy. They discuss challenges such as stereotypes in textbooks, unequal classroom participation, and cultural barriers. The video is valuable for linking theoretical debates on “rights within education” to everyday practices inside schools.

### Breaking Barriers: Gender and Access to Education — a panel discussion on obstacles to access, useful for showing real world examples of barriers to rights through education.

This panel discussion focuses on obstacles to girls’ and women’s access to education, including poverty, violence, and institutional discrimination. It demonstrates how barriers to “rights to education” can undermine broader societal equality. Students can use this video to critically reflect on how structural inequalities intersect with education and to connect with themes such as intersectionality and multiple discrimination.

### A new generation: 25 years of efforts for gender equality in ... — report and analysis of progress over time, very relevant for linking past and current policies.

Produced as a reflective overview, this video charts the progress and remaining challenges in gender equality in education over the past 25 years. It ties together international commitments (such as Beijing Platform for Action) and evaluates progress at the global level. It is particularly relevant for situating the EU and Turkish experiences within broader global trends.

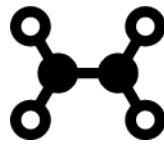
Teaching Gender Equality In Schools — addresses how schooling — content, pedagogy, teacher practices — can (or should) embed gender equality; helpful especially for “rights within” and also for how that leads to rights through education.

This video addresses practical strategies for embedding gender equality in teaching practices and curricula. It critiques gender stereotypes in educational materials and suggests ways to promote inclusivity. This makes it highly relevant for thinking about how “rights within education” can lead to “rights through education,” as the norms internalized in classrooms spill over into the broader social and political sphere.

## STUDY QUESTIONS

1. How do international frameworks such as Jomtien, Beijing, Dakar, and the SDGs frame access to education as a matter of rights, and in what ways does this framing link to epistemic justice?
2. In what ways do curricula, teaching practices, and classroom interactions reproduce or challenge gender hierarchies, and how do these dynamics illustrate the limits of focusing only on gender parity?
3. How can education function as a lever for broader social transformation in the labour market, politics, and family life, and under what conditions does it fall short of producing substantive gender equality?
4. To what extent have EU policies and programmes (e.g., Erasmus+, Horizon Europe, the European Gender Equality Strategy) advanced not only gender balance in education but also feminist epistemic justice in knowledge production and representation





## POLITICAL REPRESENTATION OF WOMEN

The question of women's political representation lies at the heart of democratic theory and practice. It is not merely about the number of women in parliaments or cabinets but about the quality and inclusiveness of democracy itself. Political systems that fail to incorporate women's voices not only reproduce social hierarchies but also undermine their own legitimacy. Feminist scholarship has long argued that gender parity in politics is not an "add-on" but a democratic imperative, because who sits at the table shapes both the agenda and the outcomes of decision-making.



This chapter explores the multifaceted dimensions of women's representation. We begin with theoretical perspectives—ranging from Anna Philip's and Suzanne Dovi's arguments on justice, legitimacy, and institutional trust, to Kanter's Token Theory—which highlight the symbolic and structural significance of women's presence in politics. We then examine the distinction between descriptive and substantive representation, asking whether women's presence leads to different policy outcomes and whether voters expect women to better articulate gendered concerns. Finally, we turn to the benefits, obstacles, and minimum conditions for women's effective political participation, paying attention to both structural barriers and enabling factors such as economic empowerment, political will, and the achievement of critical mass.

Taken together, these debates move us beyond a numerical understanding of representation toward an appreciation of its transformative potential. Women's political participation has been shown to enhance standards of living, increase trust in institutions, foster collaborative styles of leadership, and contribute



to peace-building and conflict resolution. Yet these gains are neither automatic nor guaranteed: they require supportive structures, resources, and sustained commitment. The study of women's political representation is therefore not just about counting women but about rethinking democracy, legitimacy, and development through a gendered lens.

### Guiding Questions

1. Why does women's political representation matter for democracy beyond questions of fairness or equality?
2. How do feminist theories (Philip, Dovi, Kanter) help us understand the symbolic, institutional, and cultural dimensions of representation?
3. In what ways might the presence of women in politics transform not only outcomes but also the norms and practices of political life?



### Guiding Questions

## GLOBAL FRAMEWORKS

Women's political representation has not advanced in isolation; it has been embedded within broader international frameworks that treat gender equality as both a human rights imperative and a developmental necessity. Each framework has gradually expanded the normative space for women's participation, establishing political representation not merely as an issue of fairness, but as central to democratic governance, peacebuilding, and sustainable development.

### ***CEDAW (1979)***

The Convention on the Elimination of All Forms of Discrimination against Women (CEDAW) marked a watershed in establishing gender equality as a matter of binding international law. Often described as the international bill of rights for women, CEDAW crystallised the principle that discrimination against women is not a private or cultural matter but a structural injustice that states are obligated to address. Its definition of discrimination goes beyond formal legal barriers, recognising that stereotypes, cultural practices, and institutionalised exclusions also undermine equality. From a development perspective, this is crucial: it frames political participation not as a privilege granted to women once economic development "permits it," but as a right that must underpin development itself. By requiring states to report progress, CEDAW also introduced an accountability mechanism that has empowered women's movements worldwide to pressure governments.

### ***Beijing Platform for Action (1995)***

If CEDAW provided the legal foundation, the Beijing Platform for Action expanded the agenda into a transformative vision of women's empowerment. Adopted in 1995, it linked political participation to twelve critical areas of concern, including poverty, education, health, and violence. Its holistic approach framed political representation as both a pathway and a product of women's empowerment: without voice and participation, policies in other domains risk remaining blind to women's needs. Beijing was significant for development debates because it positioned women not just as beneficiaries but as agents of change, capable of shaping development priorities themselves. In this sense, the Platform reframed empowerment as multidimensional—legal, political, economic, and cultural—and highlighted the systemic obstacles (patriarchal institutions, discriminatory practices, unequal burdens of care) that must be dismantled for women's representation to flourish.

### ***Women, Peace, and Security Agenda: UN Security Council Resolution 1325 (2000)***

The adoption of UN Security Council Resolution 1325 in 2000 represented a paradigm shift: it made clear that women's participation is not only a democratic good but a condition for peace and security. For the first time, the Council recognised that sustainable peace cannot be achieved without the inclusion of women in negotiations, reconstruction, and peacekeeping. This framework connects directly to development by situating gender equality within post-conflict state-building and reconstruction processes. Subsequent resolutions (1820, 1888, 1889, 1960) expanded the agenda to address sexual violence in conflict and to institutionalise gender perspectives in peace operations. For development, the WPS agenda underscores that women's representation is not an "add-on" but a precondition for building resilient, inclusive institutions in fragile contexts. It highlights the developmental consequences of exclusion: where women are sidelined, peace agreements are less durable, and reconstruction efforts reproduce existing inequalities.

### ***Millennium Development Goals (2001)***

The Millennium Development Goals (MDGs) integrated gender equality into the mainstream of development policy. Goal 3—to promote gender equality and empower women—treated women's political representation as both an indicator and driver of development. By linking representation to measurable development outcomes, the MDGs elevated women's empowerment from a social justice demand to a developmental necessity. Political participation was framed as a catalyst for better policy-making, more equitable resource distribution, and the achievement of broader development goals. However, the MDGs also revealed the limitations of focusing too narrowly on quantitative targets. While they encouraged more women in parliaments and cabinets, they paid less attention to the substantive quality of representation—whether women's voices shaped policies, or whether informal institutions continued to limit their influence. For this reason, the MDGs are both a milestone and a cautionary tale: they helped secure global attention but risked producing what Cornwall and Edwards later called "empowerment lite," where numbers improved but deeper hierarchies remained intact.

In sum, these frameworks progressively reframed women's political representation as:

- A right (CEDAW)
- An agenda for empowerment (Beijing)
- A condition for peace and reconstruction (WPS/1325)
- A development goal and benchmark (MDGs)

Taken together, they signal that women's representation is not only about inclusion in politics but is foundational to broader processes of social transformation, sustainable peace, and equitable development.

*Why is women's representation in legislative and decision-making institutions important, and what*



## FEMINIST THEORIES OF POLITICAL REPRESENTATION

Parliament' should represent social structure. This includes the representation of men and women from diverse ethnic, racial, linguistic and religious minorities. This increases legitimacy, increases the quality of



democracy and enhances socio-economic development. Political representation of women decreases mistrust and increases democratic legitimacy by improving the consultation process.

***Anna Philip (1998): Four Arguments for Women's Representation***

Anna Philip's contribution to feminist political theory provides a structured justification for why women's representation in politics is indispensable. Her framework moves beyond abstract calls for equality by articulating four interrelated arguments, each grounded in different dimensions of justice, democracy, and development.

**First**, Philip argues that women politicians serve as role models for other women and girls. Representation is not simply about holding office; it is about signalling to society that women belong in spaces of authority. The presence of women in political institutions breaks down stereotypes that politics is inherently masculine, making it easier for subsequent generations of women to imagine themselves as legitimate political actors. This is particularly significant in patriarchal societies where political leadership has long been constructed as a male preserve. Role models therefore generate a multiplier effect: by normalising women's leadership, they encourage broader participation and begin to dismantle the cultural barriers that deter women from entering politics. Research has shown that girls who grow up in constituencies represented by female politicians are more likely to participate in civic and political activities themselves, illustrating how symbolic representation has tangible generational impacts.

**Second**, Philip highlights the justice argument: equal representation of women and men is a fundamental democratic principle. If women constitute half the population but remain marginal in parliaments and governments, the democratic promise of equality is hollow. This argument frames women's underrepresentation not as a technical problem to be solved but as a violation of basic rights and principles. Justice here is about both recognition and redistribution: recognition of women as full citizens entitled to equal participation, and redistribution of political power to reflect that entitlement. This is why feminist scholars insist that gender quotas and parity laws are not privileges for women but corrective measures designed to fulfil democracy's own claims. Without gender balance in decision-making, democratic institutions cannot genuinely claim to represent "the people."

**Third**, Philip argues that women's interests are best represented by women themselves. While men may act as allies, the lived experiences of women—ranging from reproductive health and childcare to gender-based violence and pay equity—shape perspectives and priorities that men often do not share or even recognise. Feminist epistemology reinforces this point by showing that knowledge is situated: women's social positions give them access to forms of understanding that are obscured to those in dominant positions. Thus, women's representation is not just a matter of descriptive equality but also of substantive outcomes. Empirical studies support this claim: women parliamentarians are more likely to introduce bills on childcare, education, health, gender equality, and social protection. This does not mean that all women will always prioritise feminist concerns—representation is not monolithic—but it does mean that the systematic exclusion of women limits the range of issues that reach the political agenda.

**Fourth**, Philip maintains that women's political representation revives democracy itself. When parliaments and governments include women, they broaden the scope of democratic deliberation and enhance its legitimacy. Women's voices bring diversity of perspective that challenges entrenched hierarchies and makes political debate more inclusive. Moreover, increased representation disrupts the tendency of institutions to become closed, elitist, and unresponsive to citizens. By pushing institutions to be more accountable to diverse populations, women's political presence can reinvigorate trust in democratic processes. In this sense, women's inclusion is not just an act of justice toward women, but an act of renewal for democracy as a whole. Development scholars have further noted that democracies with

higher levels of women's representation tend to be more responsive to social needs, less prone to corruption, and more committed to sustainable and equitable policies.

Together, Philip's four arguments weave symbolic, normative, and practical dimensions of representation into a coherent defence of women's political inclusion. They highlight that representation is not only about numbers but about reshaping culture, protecting interests, and revitalising democratic legitimacy.

### **Suzanne Dovi (2007): Extending the Framework**

While Anna Philip's (1998) four arguments establish a strong foundation for women's political representation, Suzanne Dovi (2007) sharpened this analysis by adding two further justifications: the institutional trust argument and the legitimacy argument. Both move the debate from individual benefits (such as role models) or moral claims (justice and fairness) toward systemic effects that women's representation has on institutions themselves.

**First**, the institutional trust argument. Dovi suggests that when women are visibly present in political institutions, they help to cultivate greater public trust in those institutions—especially among women citizens. In societies where women's perspectives have historically been marginalised or ignored, parliaments and governments often appear distant, elitist, and male-dominated. This perception fosters alienation and disengagement, particularly among women and other excluded groups. The presence of women in leadership helps to counter this by signalling that institutions are responsive to the diversity of their populations. Trust, in this sense, is not simply emotional but political: it is the belief that institutions are inclusive, fair, and worth engaging with. Empirical studies support this claim, showing that countries with higher proportions of women in parliament tend to have higher levels of citizen trust in government and greater participation in democratic processes. Thus, women's inclusion strengthens the very fabric of democratic legitimacy by making institutions more credible in the eyes of those they govern.

**Second**, the legitimacy argument. Dovi emphasises that women's participation increases the democratic legitimacy of political institutions. Legitimacy is not merely about following formal procedures—it is about whether citizens recognise institutions as genuinely representative of the societies they claim to serve. When half the population is absent or underrepresented, institutions risk appearing illegitimate, biased, and exclusionary. Women's inclusion corrects this imbalance by ensuring that decision-making bodies more accurately reflect the diversity of the polity. From a feminist perspective, this argument underscores that legitimacy is not a neutral concept: it is deeply tied to questions of power, recognition, and inclusion. Political systems that exclude women cannot plausibly claim to be democratic in any meaningful sense, since democracy implies not just majority rule but equal citizenship.

Both of Dovi's arguments matter profoundly for development. Development requires institutions that citizens trust and see as legitimate; without this, reforms face resistance, policies lack compliance, and programmes fail to address the needs of the people. Gender equality in representation therefore has ripple effects far beyond parliament: it enhances governance, strengthens policy implementation, and improves development outcomes. For example, inclusive legislatures are more likely to prioritise health, education, and social welfare—areas central to human development. Equally, women's participation contributes to stability and conflict resolution: research on peace processes shows that agreements are more durable and legitimate when women are included in negotiations, a finding that resonates strongly with the Women, Peace, and Security agenda.

By situating women's representation within the broader institutional context, Dovi shifts the debate from individual benefits to systemic resilience. Her arguments reinforce that women's political presence is not

just a question of fairness or justice—it is a structural condition for sustainable democracy and development.

### ***Moss Kanter's Token Theory and the Politics of Representation***

While Philip (1998) and Dovi (2007) emphasise why women's political representation is normatively and democratically essential, Rosabeth Moss Kanter (1977) provides a sociological framework for understanding the dynamics of women's presence in male-dominated environments. Her token theory examines what happens when women enter spaces where they constitute less than 16 per cent of members — what she calls a token minority.

Kanter shows that in such contexts, women experience three recurrent tendencies: visibility, assimilation, and contrast.

**Visibility** refers to the heightened scrutiny women face as tokens. Because they are so few, their actions are amplified and overinterpreted, often becoming symbolic of all women. A single woman in a parliamentary committee or corporate boardroom is treated as the representative of her entire gender, bearing an unfair burden of performance. Mistakes are magnified, successes often attributed to tokenism, and individuality is denied.

**Assimilation** describes the pressure tokens face to conform to dominant stereotypes. Rather than being recognised as diverse individuals, women are cast into predetermined roles: the “motherly” figure, the “iron lady,” the “seductress,” or the “honorary man.” This assimilation process reduces complexity, framing women's presence in terms of existing gender scripts instead of allowing them to reshape the culture of the institution.

**Contrast** captures the heightened boundary maintenance that occurs when women are tokens. Male majorities often exaggerate differences, drawing sharper lines between men and women to reinforce their dominance. In parliamentary debates, for example, this can manifest in dismissive jokes, patronising language, or the relegation of women to “soft” policy areas like health, education, or family, while men monopolise finance, defence, and foreign policy.

Kanter further observed that once women's representation reaches a critical mass of around 16 per cent or higher, these dynamics begin to shift. Women move from being isolated symbols to becoming part of a normalised minority, enabling coalition-building and mutual support. At this point, they are less likely to be treated as tokens and more likely to influence institutional culture.

From the perspective of development and democracy, Kanter's theory underscores an important paradox: mere presence does not automatically produce empowerment. Until a critical mass is reached, women's representation risks reinforcing stereotypes rather than dismantling them. The very fact of inclusion can mask ongoing inequalities, creating the illusion of progress while leaving institutional norms unchanged. This is especially visible in global development contexts where governments adopt quotas or appoint a few high-profile women to signal compliance with gender equality standards, while deeper structural inequalities persist.

Kanter's framework therefore provides a crucial corrective to celebratory accounts of women's political entry. It insists that we interrogate not only the numbers of women in legislatures or cabinets, but also the quality of their participation, the burdens they bear, and the institutional cultures that shape their authority.

## TOWARDS AN INTEGRATED PERSPECTIVE ON WOMEN'S REPRESENTATION

The question of women's representation has generated rich debates across feminist political theory and sociology. Each of the key contributions — Anna Philip (1998), Suzanne Dovi (2007), and Rosabeth Moss Kanter (1977) — highlights a different but complementary dimension of why representation matters and what challenges it entails.

Philip's arguments are rooted in questions of justice and democracy. For her, women's political presence carries intrinsic value: it fulfils justice by embodying equal citizenship, provides role models that encourage future participation, ensures that women's specific interests are voiced, and revives democracy by broadening the range of perspectives in public decision-making. These arguments frame women's representation not as a luxury but as a normative requirement for democratic equality.

Dovi builds on this foundation, adding a focus on the relationship between representation and legitimacy. Her institutional trust argument suggests that women's presence in political institutions builds citizens' confidence that these bodies are inclusive and responsive. Similarly, her legitimacy argument positions women's participation as necessary for democratic institutions to be recognised as legitimate by the societies they govern. In Dovi's view, women's inclusion is not only about justice in principle but also about sustaining trust in democracy in practice.

Kanter's token theory, by contrast, highlights the institutional dynamics that shape what representation means in real-world contexts. She shows that women's mere entry into male-dominated institutions does not automatically translate into influence. Instead, when women remain tokens — less than a critical mass — they are subjected to visibility, assimilation, and contrast, which distort their contributions and reinforce rather than challenge stereotypes. Only once numbers shift can women begin to normalise their presence, form coalitions, and transform institutional cultures.

When read together, these perspectives create a fuller picture. Philip gives us the why: women's representation is necessary for justice and democracy. Dovi adds the so what: without women, institutions lack legitimacy and risk eroding citizen trust. Kanter explains the how: representation interacts with institutional dynamics, and without attention to tokenism and critical mass, numbers alone cannot guarantee empowerment.

The integrated lesson for development is clear: women's representation matters not only symbolically but substantively, not only for justice but also for legitimacy and institutional transformation. Development frameworks that champion gender equality must therefore move beyond headcounts to interrogate the quality of women's participation, the structural barriers they face, and the cultural scripts that shape their authority. Without this, representation risks becoming what Cornwall and Edwards call “empowerment lite”: a symbolic presence that leaves deeper hierarchies intact.

## DESCRIPTIVE VS. SUBSTANTIVE REPRESENTATION

Hanna Pitkin's (1967) classic typology distinguishes between different forms of political representation, two of which have been particularly influential in feminist debates: descriptive representation and substantive representation. These concepts are not just technical distinctions; they are deeply political, shaping how we think about the presence, authority, and impact of women in politics.

At its core, **descriptive representation** refers to the idea that elected bodies should “mirror” the demographic and social characteristics of the population they represent. It is the principle that voters often prefer candidates from their own social group — whether defined by gender, ethnicity, class, or

religion — because such candidates are seen as more likely to understand their lived experiences and perspectives (Bergh and Bjørklund 2011; Teney et al. 2010).

For women, this means that female voters are often more inclined to support female candidates, particularly in political parties where women hold visible leadership positions. This effect is not just symbolic: the expectation is that increased visibility of women in political institutions generates a virtuous cycle. As women occupy more seats, they not only normalise women's political presence but also inspire further female candidacies, fostering long-term transformation.

Jane Mansbridge (1999) argued that descriptive representation matters precisely because it enhances trust between representatives and constituents. In societies where women have historically been excluded from power, the presence of women in parliaments and cabinets sends a powerful signal: politics is not the exclusive domain of men. This visibility can shift perceptions of credibility, challenging entrenched gender stereotypes.

However, descriptive representation is not automatic. Research shows that women are more likely to vote for female candidates only when these women are perceived as genuinely committed to feminist values and equality-oriented agendas (Campbell and Heath 2017; Giger et al. 2014). In other words, gender alone is not enough; it must be paired with a feminist orientation. This reveals both the promise and the limits of descriptive representation: it can open doors to inclusion, but it risks being hollow if it does not translate into meaningful policy action.

**Substantive representation**, by contrast, focuses not on who politicians are, but on what they do. It refers to the extent to which party representatives' activities, decisions, and policies respond to their voters' concerns (Pitkin 1967). From this perspective, what matters is whether women's interests, demands, and needs are being effectively advanced, regardless of the gender of the representative.

This concept is crucial because research consistently shows that a voter's gender is one of the strongest predictors of their policy preferences on issues such as childcare, reproductive rights, gender quotas, and sexual violence (Htun and Weldon 2010; Kaufmann and Petrocik 1999). While social cleavages like class or the rural-urban divide also shape preferences, gender has emerged as a particularly salient cleavage in equality-related debates.

As gender equality has become a cultural and political fault line, parties' gender ideologies now significantly influence voting behaviour. Women are increasingly mobilised by parties that take strong stances on equality, while parties ignoring or resisting gender issues risk losing legitimacy. This means political actors cannot treat gender issues as peripheral or "secondary": they must address them directly if they want to ensure substantive representation of half the population.

Yet, the relationship between descriptive and substantive representation is complex. More women in parliament does not automatically guarantee feminist policy outcomes. In some cases, women representatives may be co-opted by party hierarchies or pressured to conform to masculine political styles, limiting their ability to act on gender concerns. Conversely, male politicians can also be substantive representatives of women's interests if they adopt equality-based policy agendas.

The interplay between descriptive and substantive representation goes beyond theory — it is vital for democracy's quality and for broader development outcomes. Descriptive representation signals inclusion and breaks down symbolic barriers, while substantive representation ensures that policy outputs address structural inequalities. Together, they reinforce both the legitimacy and the effectiveness of democratic institutions.



For development, the stakes are particularly high. Gender-inclusive policies on education, healthcare, labour rights, and political participation have been shown to enhance socio-economic growth, reduce poverty, and improve governance outcomes. When women's voices are both present (descriptive) and heard (substantive), societies are more likely to craft policies that are equitable, sustainable, and empowering.

The distinction between descriptive and substantive representation has shaped decades of scholarship on women in politics, but the two cannot be understood in isolation. Together, they form a dialectic: descriptive representation provides the conditions of possibility for substantive representation, while substantive representation determines the political significance of descriptive gains.

From a feminist perspective, the presence of women in political institutions is not merely symbolic. Descriptive representation is often a precondition for substantive change. Women's visibility normalises female authority, expands the pool of role models, and chips away at stereotypes of politics as a masculine domain. In turn, this can create openings for policies that respond more directly to women's concerns.

For instance, the introduction of gender quotas in parliaments across Latin America and Africa did not just increase women's descriptive presence; it also produced shifts in policy agendas, bringing issues like gender-based violence, maternal health, and childcare onto the legislative table. Here, descriptive representation acted as a lever for substantive gains.

At the same time, substantive representation does not strictly require descriptive parity. Male politicians can and do act on women's interests — for example, male allies who champion reproductive rights or anti-violence legislation. Yet, feminist scholars caution that without descriptive inclusion, substantive representation remains fragile. When women's presence in institutions is minimal, their interests are vulnerable to being instrumentalised, marginalised, or deprioritised depending on political expediency.

The relationship between the two is not always linear or harmonious. More women in parliament does not automatically mean better substantive outcomes for women. Some female politicians may be constrained by party hierarchies, co-opted by patriarchal political cultures, or even act against feminist agendas. In such cases, descriptive representation risks becoming a form of “empowerment lite”: numbers without transformative impact.

Equally, voters' expectations complicate the dynamic. Female politicians are often held to higher standards of substantive responsiveness on women's issues than their male counterparts. While men may be praised for supporting equality, women are criticised if they do not prioritise it. This double burden illustrates the persistent performative constraints on women in politics.

A feminist analytical framework therefore treats descriptive and substantive representation as mutually reinforcing but analytically distinct.

- Descriptive representation matters because it tackles the symbolic exclusion of women and legitimises their presence in decision-making.
- Substantive representation matters because it ensures that women's lived experiences, interests, and concerns are addressed in the policymaking process.

The real challenge is ensuring that descriptive gains translate into substantive outcomes. This requires supportive institutional environments, feminist political cultures, and accountability mechanisms that prevent women's presence from being tokenised.

The integration of these two forms of representation highlights why women's political inclusion is not a matter of numbers alone. It is about reconfiguring the very logics of power, authority, and legitimacy.

Democracies that achieve descriptive parity but fail substantively risk disillusioning citizens and reinforcing cynicism. Conversely, democracies that pursue both forms together expand their legitimacy, strengthen trust, and advance more equitable development outcomes.

From a development perspective, then, representation must be understood as both symbolic and practical. Descriptive inclusion without substantive change is hollow; substantive gains without descriptive presence are unstable. Only when the two move together can political systems genuinely deliver feminist empowerment and broader social justice.

## WOMEN'S POLITICAL REPRESENTATION: BENEFITS, OBSTACLES, AND CONDITIONS

Women's political representation is not only a matter of fairness or rights but also a substantive driver of democratic quality, peace, and development. Empirical research demonstrates that the presence of women in decision-making bodies contributes to higher standards of living, as women representatives are more likely to foreground concerns related to health, education, and welfare. Equally important, women's political participation ensures that the voices of marginalized groups—often ignored in male-dominated parliaments—are articulated and institutionalised. This improves the inclusiveness of democracy and strengthens its legitimacy. Women leaders also tend to employ more collaborative leadership styles, showing greater willingness to work across party lines and build consensus. In post-conflict societies, women's presence in negotiations has been linked to more durable peace agreements and to policies that prioritize reconciliation and social healing. These contributions collectively enrich democratic decision-making and lead to better outcomes for society as a whole.

Despite these documented benefits, women continue to face structural and systemic obstacles that limit both their entry into politics and their effectiveness once in office. Legal frameworks often fail to ensure gender-equitable access to candidacy and officeholding. Economic barriers—such as unequal pay, the feminisation of poverty, and lack of financial resources for campaigning—further entrench inequality. Educational gaps in some contexts restrict women's ability to navigate political institutions or to be seen as “qualified” candidates. Social, cultural, and religious norms also perpetuate exclusion by reinforcing gendered expectations about women's roles in the family and public life. Time poverty—the double burden of professional and domestic responsibilities—compounds these challenges, as does the lack of safe physical and political spaces free from harassment and gender-based violence. Moreover, internalised barriers, such as lack of confidence or the fear of hyper-scrutiny, further inhibit women's political ambition. These obstacles reveal that representation is not simply a matter of access but is shaped by broader institutional, cultural, and psychological dynamics.

For women to participate fully and effectively in political life, a set of minimum conditions must be met. First, women require genuine access to positions of power, not merely tokenistic appointments. Political systems must be transparent and accountable, reducing the informal barriers and patronage networks that often exclude women. Cultural norms need to shift to normalise women's presence in leadership positions, a transformation that requires both legal measures (e.g., quotas, parity laws) and broader societal change. Economic empowerment is indispensable, since without financial independence women remain vulnerable to exclusion. Political will is equally critical: without commitment from political elites, reforms risk remaining symbolic. Beyond access, women need voice—the ability to shape agendas, influence debate, and set priorities. This requires empowerment not only at the individual level but also collectively through the achievement of a critical mass. Once women constitute a significant proportion of a legislature (often theorised around 30%), they are better able to overcome tokenism and exert substantive influence.

Scholars also identify three interrelated pillars that sustain women's effective participation: access, capacity, and resources. Access entails ensuring representative resources (quotas, recruitment mechanisms) as well as material and economic resources that enable women to campaign, govern, and survive politically. Access also depends on democratic and cultural space, including freedom from intimidation and the ability to express feminist or gender-sensitive positions without fear of backlash. Information resources, especially gender-disaggregated data, are vital for monitoring progress and holding institutions accountable. Capacity refers to the skills, networks, and institutional knowledge that women need to translate access into effective participation. Training, mentorship, and solidarity networks are therefore indispensable. Together, these elements ensure that women's political presence is not symbolic but transformative, capable of reshaping both policies and the norms of governance.

## VIDEO RESOURCES

To deepen our discussion on rights through education, we will complement the lecture with a series of short videos. These resources bring theoretical concepts into conversation with lived realities, offering perspectives from international organizations, teachers, activists, and students themselves. By engaging with them, you will be able to connect abstract debates about gender equality and education with concrete initiatives, policies, and classroom practices across different contexts. As you watch, consider how these videos illustrate the relational nature of gender equality in and through education, and think critically about the extent to which education has transformative potential beyond the school walls.



Promoting Gender Equality Through Education: AUN DESA — this video links SDG 4 (quality education) and SDG 5 (gender equality).

This short UN video explains how quality education (SDG 4) is interlinked with gender equality (SDG 5). It highlights global policy frameworks, statistics on gender disparities, and specific programs aimed at empowering girls. It is particularly useful to understand the international development perspective and the emphasis on education as a global human right.

Empowering Education: Teachers Reflect on Gender Equality... — teachers discuss how gender equality plays out in classrooms, which ties into your “rights within” and “rights through” education angles.

In this resource, teachers from different contexts share experiences of integrating gender-sensitive pedagogy. They discuss challenges such as stereotypes in textbooks, unequal classroom participation, and cultural barriers. The video is valuable for linking theoretical debates on “rights within education” to everyday practices inside schools.

Breaking Barriers: Gender and Access to Education — a panel discussion on obstacles to access, useful for showing real world examples of barriers to rights through education.

This panel discussion focuses on obstacles to girls' and women's access to education, including poverty, violence, and institutional discrimination. It demonstrates how barriers to “rights to education” can undermine broader societal equality. Students can use this video to critically reflect on how structural inequalities intersect with education and to connect with themes such as intersectionality and multiple discrimination.

A new generation: 25 years of efforts for gender equality in ... — report and analysis of progress over time, very relevant for linking past and current policies.

Produced as a reflective overview, this video charts the progress and remaining challenges in gender equality in education over the past 25 years. It ties together international commitments (such as Beijing Platform for Action) and evaluates progress at the global level. It is particularly relevant for situating the EU and Turkish experiences within broader global trends.

Teaching Gender Equality In Schools — addresses how schooling — content, pedagogy, teacher practices — can (or should) embed gender equality; helpful especially for “rights within” and also for how that leads to rights through education.

This video addresses practical strategies for embedding gender equality in teaching practices and curricula. It critiques gender stereotypes in educational materials and suggests ways to promote inclusivity. This makes it highly relevant for thinking about how “rights within education” can lead to “rights through education,” as the norms internalized in classrooms spill over into the broader social and political sphere.

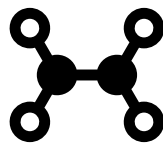
## STUDY QUESTIONS

1. Compare and contrast descriptive and substantive representation. To what extent can one exist without the other?
2. What are the main structural, cultural, and personal obstacles that continue to hinder women’s full political participation, and how might they be addressed?
3. Does increasing the number of women in politics necessarily lead to more gender-equitable policies? Why or why not?



# PART 2





## GENDER POLITICS IN THE EUROPEAN UNION

The European Union (EU) presents itself not merely as an economic bloc, but as a normative power with a mission to export values of democracy, human rights, and equality. Within this broader narrative, gender equality has been constructed as both a legal principle and a symbolic marker of European identity. Yet, despite decades of legal innovation and policy commitments, the EU's record on gender equality reveals striking tensions: ambitious rhetoric and soft governance tools on one side, and persistent gaps, exclusions, and backlashes on the other.

To unpack these dynamics, we need to place them within the framework of Europeanisation. As Radaelli (2002: 11) famously defines it, Europeanisation is a multidimensional process of construction, diffusion, and institutionalisation of rules, procedures, policy paradigms, and “ways of doing things” that are first shaped in Brussels and then gradually woven into domestic political structures, discourses, and identities. In other words, the EU is not simply a regulator of markets or laws: it is also a producer and diffuser of norms and values, including those relating to gender.

## Guiding Questions

How does looking at EU treaties through the lens of “big institutional milestones” risk obscuring the everyday struggles of women and marginalised groups in Europe?

In what ways have feminist activists and scholars influenced treaty reforms, even when their contributions were not fully recognised in official narratives?

Can we think of “European integration” not only as an economic or political process but also as a struggle over whose voices and knowledges are legitimised?



The story of gender politics in the EU begins with a paradox. When the Treaty of Rome (1957) enshrined the principle of equal pay for equal work, it was not primarily out of feminist commitment but due to French concerns about maintaining fair competition with member states that paid women less. Nevertheless, this seemingly pragmatic clause laid the foundations for gender equality to be embedded in EU law. Still, for nearly two decades, EU institutions remained an overwhelmingly male space. It was only with the adoption of the Equal Treatment Directive (1976) that a more explicit gender equality agenda emerged, expanding the Treaty’s narrow equal pay clause into a more comprehensive legal framework against discrimination in employment. This marked the EU’s first significant hard law intervention on gender equality, requiring member states to align their domestic legislation with EU standards.

From the 1970s onward, the EU progressively expanded its mandate on gender. By the 1990s, especially following the 1995 Beijing Platform for Action (BPfA), the EU began framing gender equality as integral to its identity and legitimacy as a democratic project. This was a crucial shift: gender equality became not just a social policy concern but part of what made the EU distinct in the global arena.

The European Parliament captured this ambition in 2000 when it declared that the incorporation of women into decision-making structures strengthens democracy by better reflecting the diversity of society, improving governance, and making more effective use of human resources. In this sense, gender equality was presented as a functional necessity for modern democracy, not only a moral obligation.

Despite this strong discursive turn, the EU’s practical tools often fell short. The 1970s–1980s were marked by hard law instruments—directives on equal treatment, equal pay, and occupational equality—that were enforceable and binding. By contrast, the 1990s and 2000s saw a turn to soft law: recommendations, benchmarks, gender mainstreaming strategies, and the “open method of coordination.” While these tools helped spread gender equality norms across diverse member states, they lacked enforcement capacity. Moreover, the EU often relied on awareness-raising campaigns, funding civil society projects, and collecting gender-disaggregated data. While valuable, these measures frequently carried a patronising, top-down tone, and their impact was hindered by the lack of comparable data across member states. Without reliable indicators, monitoring progress or holding governments accountable proved challenging.

One of the most striking shortcomings has been the EU’s failure to account for diversity among women. Ethnic minority women, migrant women, and women at the intersection of multiple forms of disadvantage are often absent from EU databases and policy documents. When they do appear, it is

largely in relation to migration debates, rather than as full political actors in their own right. This creates a flattened, one-size-fits-all notion of “woman” that obscures intersectional inequalities.

At the same time, recent years have revealed a growing backlash. The European Parliament’s Policy Department for Citizens’ Rights and Constitutional Affairs (2018) reported a regression in gender equality across six EU member states (Austria, Hungary, Italy, Poland, Romania, and Slovakia). These backlashes are linked to broader trends of democratic erosion, the rise of illiberal populism, and the politicisation of “gender” as a cultural threat. Crucially, EU membership itself does not guarantee compliance: once accession is secured, gender equality norms can be deprioritised or abandoned altogether.

This brings us to a crucial point: Why is a feminist framing of EU gender politics necessary? Existing approaches, focused on legal harmonisation and technocratic indicators, risk reducing gender equality to a box-ticking exercise. A feminist perspective highlights that genuine transformation requires addressing:

Power structures embedded in both EU and domestic institutions.

Informal practices and discourses that reproduce inequality even in the presence of formal rules.

Intersectional exclusions that silence minority and marginalised women.

The political will to enforce—not just promote—gender equality.

Without this lens, the EU risks presenting itself as a global champion of gender equality while failing to address its internal contradictions.

Scholarly work on gender and the EU reflects these tensions. One strand focuses on the Europeanisation of gender equality policies, showing how EU norms influence domestic reforms (Chiva 2009; Forest and Lombardo 2012; Jacquot 2015; Bego 2015; Kantola 2010; Abels and MacRae 2016). Another strand applies feminist institutionalism, exposing the structural and institutional barriers that prevent the EU’s gender agenda from reaching its full potential (Eräranta and Kantola 2016; Ansorg and Haastrup 2018).

Together, these perspectives remind us that the EU’s gender project is both a symbol of progress and a site of struggle. On the one hand, it has created pioneering legal frameworks and projected gender equality as part of Europe’s identity. On the other, its reliance on soft tools, neglect of diversity, and vulnerability to backlash reveal the limits of its transformative power.

In this book, we turn our attention to the European Union’s gender equality policies, exploring both their promises and their limitations. The EU has long positioned itself as a global frontrunner in promoting gender equality, yet its achievements are often uneven, fragmented, and subject to political contestation. To capture this complexity, the chapters in this volume address a wide spectrum of themes, ranging from theoretical debates to concrete policy instruments and country-specific experiences.

## THE EU AS A POLITICAL ENTITY

The EU is not merely an economic arrangement—it is also a deeply political entity, seeking to shape a shared identity and sense of belonging among its member states. This political identity is symbolized in various ways. The anthem, Ode to Joy from Beethoven’s 9th Symphony with Schiller’s lyrics, symbolizes unity and harmony among European peoples. The EU flag, twelve golden stars on a blue background, represents solidarity, unity, and perfection. The euro has become a visible symbol of integration, while Europe Day (9 May) commemorates the Schuman Declaration of 1950, the moment that set in motion

the idea of European cooperation. Equally, the EU motto “United in Diversity” underscores the ambition to embrace cultural and linguistic plurality while forging common political and social ground.

Language is another dimension of EU identity: with 24 official languages, the Union signals its respect for linguistic diversity while also underlining the challenges of multilingual governance. These symbols do more than decorate—they build the EU’s legitimacy as a political project, communicating belonging to citizens while projecting identity abroad.

The origins of this project lie in Europe’s turbulent history. The destruction of the Second World War, vividly remembered in the ruins of European cities, provided a stark lesson in the costs of division. The Cold War further cemented the need for Western European cooperation in the face of Soviet expansion, as illustrated by the symbolic opposition of the hammer and sickle to NATO’s blue compass. It was in this historical moment that the Schuman Declaration of 9 May 1950 was delivered, emphasizing that Europe “will not be made all at once, or according to a single plan, but through concrete achievements which first create de facto solidarity.” Coal and steel were to be pooled, turning instruments of war into tools of peace.

The early “founding fathers”—Robert Schuman, Jean Monnet, Konrad Adenauer, Alcide de Gasperi, and others—were crucial in building the foundations of peace and prosperity. The EU thus began as a political experiment rooted in reconciliation and pragmatic cooperation, aiming to prevent war by embedding states in shared institutions.

But symbols extend beyond flags and anthems. The EU’s historical narrative, particularly how it tells the story of its origins, is also part of its symbolic power. For decades, the official discourse celebrated the “founding fathers” of European integration — figures such as Robert Schuman, Jean Monnet, Konrad Adenauer, and Alcide De Gasperi. This framing reflected the male-dominated political landscape of the mid-20th century and reinforced the gendered exclusions of European politics.

In recent years, however, the EU has consciously shifted to speaking of “pioneers” rather than “founding fathers.” This linguistic move reflects a broader commitment to gender-sensitive representation. It makes space for acknowledging figures such as Simone Veil, the first elected President of the European Parliament and a trailblazer for women’s rights in Europe, whose work embodied the democratic and inclusive aspirations of the European project. The shift also underlines that integration was not the work of a few men in power alone but rather a collective and ongoing effort shaped by diverse actors across societies.

This change in terminology is more than symbolic; it is political. By reframing its past, the EU signals that even its foundational narrative can and should evolve in line with the principles it now claims to uphold — democracy, inclusivity, and gender equality. In this way, the Union’s self-presentation as a political entity is not static but dynamic, responsive to new understandings of justice and representation.

## FROM COOPERATION TO UNION: EVOLUTION OF THE EU

The EU as we know it today was not born overnight. It is the result of decades of gradual integration, shaped by shifting historical contexts, evolving political visions, and constant negotiation between national sovereignty and supranational authority. The EU’s evolution can best be understood as a process moving from functional cooperation towards a deeper political union.

At this point it is important to underline that none of these issues — gendered socialisation, segregation in education and work, unequal access to resources, early marriage, or underrepresentation in politics — exist in isolation. They are all deeply tied to development outcomes.

The origins of European integration lie in the trauma of World War II. Europe in 1945 was a continent in ruins: cities destroyed, economies shattered, and millions displaced. At the same time, memories of two devastating wars within a generation fuelled a strong determination to prevent another conflict. Against this backdrop, European integration was framed as a peace project.

The Schuman Declaration of 9 May 1950 — often celebrated as the “birth certificate” of the EU — proposed pooling French and German coal and steel production under a common authority. These were not random sectors: coal and steel were the raw materials of war. By making their management a shared responsibility, the declaration sought to render war between France and Germany “not merely unthinkable, but materially impossible.” This initiative gave rise to the European Coal and Steel Community (ECSC) in 1951, involving six countries: France, West Germany, Italy, Belgium, the Netherlands, and Luxembourg.

The ECSC was modest in scope but revolutionary in principle: it marked the first time that states voluntarily transferred part of their sovereignty to a supranational body. This principle of shared sovereignty would become the cornerstone of the European project.

Encouraged by the ECSC’s success, the six founding states deepened their cooperation. The **Treaties of Rome (1957)** established the European Economic Community (EEC) and the European Atomic Energy Community (EURATOM). The EEC in particular was transformative: its aim was not only to create a common market but also to lay the foundations for “an ever closer union among the peoples of Europe.”

This phrase carried a strong symbolic weight. Economic cooperation was not simply about growth and efficiency; it was explicitly linked to the broader goal of political unity. The customs union, the free movement of goods, services, people, and capital, and the creation of common policies (such as the Common Agricultural Policy) gradually bound national economies together.

At the same time, integration remained an elite-driven process. Decision-making was concentrated among governments and institutions, and the public was often only indirectly involved. Yet, by the 1970s and 1980s, the effects of integration were felt in everyday life: lower trade barriers, increased mobility, and the first steps toward monetary cooperation.

The fall of the Berlin Wall in 1989 and the end of the Cold War marked a turning point. The unification of Germany and the prospect of Eastern enlargement demanded a stronger political framework. In this context, the **Maastricht Treaty (1992)** established the European Union and transformed the scope of integration.

The treaty introduced new pillars of cooperation beyond economics: a Common Foreign and Security Policy, and Justice and Home Affairs, alongside the existing economic community. It also laid the foundation for the single currency, the euro, and expanded the powers of the European Parliament through co-decision procedures. Maastricht thus represented the moment when Europe’s experiment in functional cooperation truly became a political union.

Importantly, Maastricht also sparked debates about sovereignty and democratic legitimacy. Citizens in Denmark initially rejected the treaty, and in France it passed only by a slim margin in a referendum. These controversies revealed the growing tension between supranational integration and national democratic control — a theme that continues to shape EU politics today. Maastricht also represented a missed opportunity. Despite the expansion of competences, gender equality remained peripheral, treated more as a social policy add-on than as a structural principle of integration. Feminist scholars point to this as an early example of “empowerment lite”: formal commitments without deeper transformation of institutional logics.

The 2000s saw the largest enlargement in EU history. In 2004, ten new countries — mostly from Central and Eastern Europe — joined the Union, followed by Bulgaria and Romania in 2007 and Croatia in 2013. This “**big bang enlargement**” was celebrated as the reunification of a continent long divided



by the Cold War. Yet, it also brought new challenges: greater diversity in interests, varying levels of economic development, and tensions over the rule of law and democratic backsliding.

Parallel to enlargement, the EU deepened integration through treaties such as Amsterdam (1997), Nice (2001), and Lisbon (2009). The Lisbon Treaty in particular consolidated institutional reforms, strengthened the European Parliament, created the position of President of the European Council, and gave the EU legal personality in international law.

The EU's evolution has not been linear. Crises — from the Eurozone debt crisis to Brexit, from migration pressures to the COVID-19 pandemic — have tested the resilience of the Union. Each crisis, however, has also driven new forms of integration. For example, the financial crisis led to the creation of new mechanisms for fiscal supervision and solidarity, while the pandemic triggered the unprecedented NextGenerationEU recovery fund, financed through common European borrowing.

Crises also expose the fragility of gender equality within the EU. Economic austerity disproportionately impacted women, who were overrepresented in precarious labour and underrepresented in decision-making. Similarly, the COVID-19 pandemic highlighted women's double burden of paid and unpaid care work. These episodes reveal that the EU's evolution towards union cannot be measured solely in terms of treaties and institutions; it must also be assessed through the lens of gendered impacts and inclusivity.

*How does the shift in EU discourse from “Founding Fathers” to “pioneers” reshape the way we think about women’s place in the history of European integration, and why does such symbolic language matter for understanding the EU as a political project?*



**PROMPT  
QUESTIONS**

## THE EU'S LEGAL FRAMEWORK: TREATIES

When we think of the European Union as a political entity, it is tempting to imagine it as a natural outcome of a shared European identity. Yet in reality, the EU is the product of layered historical choices, contested treaties, political crises, and shifting institutional balances. Its origins lie in the wreckage of the Second World War, when the devastation of Europe pushed leaders to search for mechanisms that could make another conflict between France and Germany not only unthinkable but materially impossible. The answer, as articulated in the Schuman Declaration of 1950, was a new type of supranational community that would bind together the most strategic war industries of the time: coal and steel.

The European Coal and Steel Community (ECSC), established by the Treaty of Paris in 1951, brought together six states—France, West Germany, Italy, Belgium, Luxembourg and the Netherlands—in a common market for these crucial resources. The ECSC was governed by a High Authority, monitored by assemblies and courts, and it marked the first bold experiment in supranational governance. From a feminist perspective, however, it is important to note how masculinized the founding vision was. Coal and steel were not just industrial commodities; they symbolised the masculine-coded domains of heavy industry and war-making. Decisions were taken by male leaders in male-dominated spaces, while issues such as welfare, social reproduction, and gender equality were conspicuously absent. The ECSC succeeded in launching the principle of supranationalism, but it did so by embedding within it the gendered silences of its time.

The initial momentum of integration was soon disrupted. The period from the mid-1960s to the mid-1980s is often referred to as the “dark ages” of European integration. The Empty Chair Crisis of 1965–66, in which France effectively paralysed Community decision-making to resist supranational ambitions, revealed the fragility of the project. The question of British membership further complicated the process. While the United Kingdom, together with Denmark and Ireland, eventually joined in 1973, its accession was preceded by repeated French vetoes. Under President Pompidou, France reopened the

door, triggering new rounds of enlargement but also reasserting the primacy of intergovernmental bargaining over supranational authority.

Despite these political difficulties, integration did not stand still. The 1970s brought the creation of European Political Cooperation, a framework for foreign ministers to coordinate policy outside of Community institutions. The first direct elections to the European Parliament in 1979 marked a step towards democratic legitimacy, although the chamber remained dominated by men, with women occupying only a marginal share of seats. At the same time, economic turbulence—oil shocks, stagflation, and monetary instability—pushed the Community to establish the European Monetary System in 1979, with its artificial currency unit, the ECU. This was a technical innovation, but again one that reflected the dominance of economic and monetary concerns over social or gendered dimensions of integration.

The revival of integration in the early 1980s came from both legal and political innovations. The European Court of Justice's ruling in the *Cassis de Dijon* case introduced the principle of mutual recognition, paving the way for a deeper single market. The European Parliament's Draft Treaty of 1984 signalled a growing concern with the democratic deficit. The same year, the Fontainebleau Council resolved Britain's budgetary grievances. Together, these developments prepared the ground for the major leap forward of the Single European Act (1986), which committed member states to completing the internal market by 1992.

From the vantage point of feminist epistemic justice, this so-called revival raises critical questions. Why was efficiency prioritised over equality? Why did market freedoms gain constitutional weight while gender equality directives remained fragile add-ons? Women activists and feminist scholars were increasingly vocal in this period, pressing the European institutions to address equal pay and non-discrimination. Yet these demands were consistently subordinated to the "hard" integration agenda of markets, currencies, and institutions. This hierarchy of priorities has long-lasting consequences, shaping the EU's identity as an economic union first and a social union only by necessity.

The real transformation of the European Communities into a Union came with the Maastricht Treaty of 1992. Maastricht introduced European citizenship, created the three-pillar structure, strengthened the role of the European Parliament through the co-decision procedure, and committed member states to economic and monetary union with a precise timetable. It also introduced the Common Foreign and Security Policy and cooperation in Justice and Home Affairs. Institutionally, the Commission became subject to parliamentary approval, the Court of Justice gained enforcement powers, and the principle of subsidiarity was articulated to balance Union and national competences.

But Maastricht was not just a legal text; it was a response to a shifting geopolitical context. German unification and the end of the Cold War required deeper political integration to anchor stability in Europe. At the same time, Maastricht revealed new divides: debates over sovereignty, social rights, and democratic legitimacy intensified, and public resistance to further integration became visible in referendums. From a feminist perspective, it is striking that while Maastricht enshrined Union citizenship, it did not fully mainstream gender equality into the political core of the Union. Citizenship was defined in ways that prioritised mobility, market access, and legal protections, but less so the substantive social and economic rights that feminist activists had long demanded.

Seen together, these decades of institutional evolution—from the ECSC through the dark ages to Maastricht—tell a story not of linear progress but of contested integration. Each treaty, crisis, and reform carried with it a set of exclusions, silences, and gendered hierarchies. To study the EU's political development, therefore, is not only to recount treaties and institutions but also to interrogate the epistemic structures that privileged some knowledges over others.

The Treaty of Maastricht set the stage for the European Union as we know it today, but it also opened a Pandora's box of new challenges. Its ambitious agenda of economic and monetary union generated controversy, not least because it tied states into strict fiscal rules that limited their autonomy over social and welfare policies. Feminist scholars have often pointed out that this neoliberal orientation entrenched a hierarchy of values in which market freedoms were elevated above social justice. Gender

equality, while present in legal provisions, remained a secondary concern — a matter of directives and programmes, rather than a principle woven into the constitutional fabric of the Union.

The 1990s were also the decade of enlargement preparations. With the fall of the Berlin Wall and the collapse of communism, the EU faced the twin challenge of “deepening” integration while also “widening” to include the countries of Central and Eastern Europe. The Amsterdam Treaty of 1997 sought to address institutional and political issues left unresolved by Maastricht. It incorporated the Schengen acquis into the EU framework, expanded the powers of the European Parliament through co-decision, and strengthened provisions on employment and non-discrimination. Significantly, Amsterdam elevated equality between women and men to a core principle of the Union, giving gender mainstreaming a treaty basis for the first time.

This was an important feminist breakthrough. Yet the treaty’s impact was limited by the persistence of broader neoliberal and intergovernmental logics. Gender mainstreaming remained uneven, often diluted in practice, and subordinated to the overriding concern of completing the internal market. Still, Amsterdam represented a symbolic moment in which feminist advocacy shaped the treaty text — a reminder that epistemic justice requires constant contestation within institutional arenas.

The Treaty of Nice in 2001 was driven less by normative ambition and more by the practicalities of enlargement. With the EU preparing to admit up to ten new member states from Central and Eastern Europe, institutional reform was unavoidable. Nice streamlined decision-making by reweighting votes in the Council and reducing the size of the Commission. However, its minimalist approach disappointed many. The treaty failed to resolve questions of democratic legitimacy and left the Union with an unwieldy structure. Feminist critiques highlighted how enlargement was framed primarily as a technocratic exercise of institutional engineering, while the profound social transformations it entailed — including the gendered dimensions of post-socialist transitions — received scant attention in official discourse.

The early 2000s brought renewed efforts at constitutional reform. The draft Constitutional Treaty of 2004 sought to simplify the treaties and give the Union a clearer identity. Its rejection in French and Dutch referendums, however, exposed deep public scepticism. The project was reworked into the Treaty of Lisbon (2007, entering into force in 2009). Lisbon abolished the pillar structure, gave legal personality to the EU, expanded the powers of the European Parliament, and created the position of High Representative for Foreign Affairs and Security Policy supported by the European External Action Service. It also strengthened the role of national parliaments, introduced the Citizens’ Initiative, and reaffirmed fundamental rights through the Charter of Fundamental Rights.

From a feminist perspective, Lisbon offered both opportunities and limitations. On the one hand, it reaffirmed equality between women and men as a foundational value of the Union and consolidated anti-discrimination clauses across multiple grounds. On the other hand, the Lisbon reforms deepened the EU’s neoliberal character by constitutionalising fiscal discipline and enhancing executive powers. Gender equality thus remained structurally constrained, often treated as a policy field rather than a lens through which all EU competences should be scrutinised.

Looking across this trajectory — Maastricht, Amsterdam, Nice, Lisbon — we see not only a sequence of treaties but a pattern of contested integration in which questions of democracy, legitimacy, and equality have never been fully resolved. Feminist epistemic justice helps us recognise how “big” treaty reforms are narrated as milestones of institutional progress, while the struggles of women, minorities, and marginalised groups often remain invisible or relegated to the margins. To tell the story differently is to make visible those exclusions and to insist that the EU’s constitutional evolution cannot be understood without reference to the voices it has historically silenced.

## RETHINKING EU INTEGRATION THROUGH FEMINIST EPISTEMIC JUSTICE

When we trace the EU's institutional development from Paris and Rome to Maastricht, Amsterdam, Nice, and Lisbon, the dominant narrative often celebrates efficiency, unity, and market integration. Yet this story is partial — it is shaped by what institutions choose to record and by which voices have historically been amplified. A feminist epistemic justice perspective challenges us to tell this history differently. It asks: whose knowledge was recognised in these treaty reforms? Whose experiences were marginalised?

Women's struggles for equality, anti-discrimination activism, and feminist scholarship have, at critical moments, pushed their way into the treaty framework — most visibly in Amsterdam's elevation of gender equality as a fundamental principle and Lisbon's reinforcement of anti-discrimination norms. But these victories often came in the margins, subordinated to the overriding logics of economic liberalisation and intergovernmental bargaining. To focus only on institutional milestones is to risk reproducing the silences that feminist theory urges us to break.

By reframing EU integration history through feminist epistemic justice, we uncover how “big moments” in treaty reform have unevenly distributed recognition and credibility. The celebrated advances in supranational authority or monetary union can appear less triumphant when viewed alongside the silencing of social justice demands, the gendered costs of neoliberal restructuring, and the persistent gap between formal commitments to equality and lived realities across member states.

This perspective does not dismiss the EU's achievements. Rather, it insists on a more plural and inclusive account — one in which integration is not only about pooling sovereignty and building markets, but also about contesting epistemic hierarchies and opening space for those excluded from the mainstream narrative. Seen in this light, European integration is an unfinished project, one that must be continually reimagined if it is to move towards genuine equality and justice.

## VIDEO SOURCES

To complement this knowledge, the following videos provide accessible insights into the concepts we have discussed. Each resource is linked to the course objectives, so you can see how it supports your learning.

[European Union – A History of Integration \(European Parliament, 6 min\)](#):

This short video provides a broad timeline overview of European integration, focusing on institutional milestones and the role of “founding fathers.” While valuable for students new to the EU, it primarily highlights high politics and economic developments, overlooking social dimensions such as gender. Its strength lies in offering a clear chronological narrative that can be critically interrogated in class. When paired with feminist epistemic justice perspectives, the video becomes a useful starting point for questioning whose voices and contributions are absent from official EU histories.

[The EU 4 Gender Equality](#):

This short institutional video outlines the EU's gender equality agenda and policy frameworks, highlighting progress in employment, political participation, and anti-discrimination measures. It presents the EU as a proactive actor in mainstreaming gender across policy domains, aligning with international commitments such as the Beijing Platform for Action and the Sustainable Development Goals. The resource is valuable for introducing students to official EU narratives on gender equality, but its celebratory tone



invites critical engagement. From a feminist epistemic justice perspective, it can be used to question whose voices are represented, which inequalities are prioritised, and whether soft-law approaches sufficiently address structural barriers and intersectional exclusions.

#### Europe has delivered for gender equality - International Women's Day

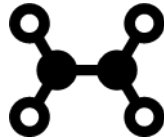
This short campaign video celebrates the EU's achievements in advancing gender equality, framing the Union as a global leader on the issue. It is emblematic of the EU's self-representation as a normative power, emphasising empowerment and equal opportunities. While motivational in tone, it glosses over persistent structural inequalities and backlash against women's rights within member states. From an epistemic justice perspective, it provides an opportunity for students to reflect on the gap between symbolic commitments and lived realities, as well as on the EU's use of gender equality as part of its identity-building and external projection of values.

### STUDY QUESTIONS

1. Compare the Treaty of Rome (1957) and the Treaty of Amsterdam (1999). How do they differ in terms of recognising social rights, gender equality, and anti-discrimination measures?
2. Discuss how the concept of epistemic injustice helps us understand the silences in EU integration history. Whose perspectives are absent or marginalised in the mainstream narratives of European integration?
3. Evaluate the Lisbon Treaty (2009). To what extent did it advance feminist agendas within the EU? Did it meaningfully address gender inequalities, or did it largely reinforce economic and neoliberal priorities?







## WHY STUDY GENDER IN THE EU?

The European Union has long cultivated an image of itself as a normative power, especially in the promotion of gender equality. From its early directives on equal pay to more recent commitments on gender mainstreaming, the EU has presented gender equality as a core element of its political identity. Yet, behind this self-image of progress lies a more complex and less flattering reality. Persistent gaps remain in the way gender is addressed, both at the institutional and policy levels. On the one hand, European integration has undeniably shaped national gender policies; on the other hand, the Union's own structures and practices continue to reproduce hierarchies and exclusions. To grasp this paradox, it is necessary to acknowledge and build upon two main strands of literature that have dominated the study of gender in the EU.

The first strand focuses on the Europeanisation of gender equality policies. This body of work explores how EU-level directives, regulations, and policy frameworks influence national gender regimes. Scholars such as Chiva (2009), Sindbjerg Martinsen (2007), Forest and Lombardo (2012), Jacquot (2015), Bego (2015), Kantola (2010), and Abels and MacRae (2016) have shown that the EU has been an important driver of policy change across member states. Through processes of conditionality, harmonisation, and soft law coordination, European institutions have managed to trigger significant legislative reforms and create momentum for gender equality. These works demonstrate that the EU has not merely been a passive actor but has actively shaped national debates and legal frameworks in ways that often exceeded domestic political will.

The second strand of literature develops a more critical perspective through the lens of feminist institutionalism. Rather than focusing on policy outputs alone, this approach investigates how institutional contexts shape, enable, and constrain gender equality measures. Feminist institutionalist scholarship—exemplified by Eräranta and Kantola (2016) and Ansorg and Haastrup (2018)—exposes the shortcomings of EU gender promotion. It reveals how institutions, while presenting themselves as gender-neutral, actually reproduce and sustain male-dominated norms and practices. By examining informal rules, hierarchies, and decision-making procedures, feminist institutionalism highlights why reforms that look promising on paper often fall short in practice.

Together, these two strands of literature point to a dual reality: the EU has the potential to be transformative in the sphere of gender politics, yet structural and institutional barriers consistently limit the depth of change. This tension is fundamental for understanding both the achievements and the persistent failures of the Union in this field.

Research on Europeanisation has emphasised the EU's role in encouraging legislative innovation and institutional reform. Scholars such as Hoskyns (1996) and Mazey (2002) demonstrated how EU directives in areas such as equal treatment and non-discrimination became catalysts for significant reforms in national contexts. The accession process for candidate countries further reinforced this dynamic, as compliance with EU gender directives became a condition for membership.

At the same time, the enthusiasm generated by legislative successes has been tempered by critical findings that point to a rhetoric–implementation gap. Van der Vleuten (2013), Ioannides (2017), and David and Guerrina (2013) highlight how commitments to gender mainstreaming often remain at the level of discourse, with implementation being partial, inconsistent, or symbolic. Zartaloudis (2014) aptly summarises this paradox by arguing that EU interventions in gender equality have been “considerable but not transformative.” In other words, while the Union has undeniably expanded the legal and institutional terrain for gender equality, it has rarely succeeded in reshaping underlying power relations.

### Guiding Questions

The EU is often described as a global leader in promoting equality and human rights. Do you think this reputation applies equally to gender politics inside the EU itself? Why or why not?

1. Imagine looking at the “family photo” of EU leaders at a summit. What would you expect to see in terms of gender representation? What would such an image communicate about power in Europe?
2. If the EU passes strong laws on gender equality, do you think this automatically translates into genuine change in workplaces, parliaments, or societies? What kinds of obstacles might stand in the way?
3. Some argue that institutions like the EU can never be neutral—they always reproduce certain power relations. Do you agree? How might this affect efforts to promote gender equality?
4. Across Europe, we see both advances in gender equality and rising backlash against it. Why do you think anti-gender campaigns have gained such traction in recent years? What does this suggest about the resilience or fragility of EU values?



### Guiding Questions

## THE EU AS A GENDERED NORMATIVE ACTOR?

Feminist institutionalism invites us to look beyond policy outputs and examine the inner workings of EU institutions themselves. Joanna Kantola's extensive research on the gendered structures of power provides an invaluable lens. Her studies have documented the uneven progress in women's representation across EU institutions. In the European Parliament, women's representation has grown from 31 percent in 2010 to almost 40 percent today. The European Commission has also made progress, evolving from a mere 6 percent in its early decades to 31 percent in the mid-1990s—a milestone moment—and reaching nearly 50 percent today.

Yet, progress has not been uniform. The Council of Ministers, arguably the most powerful institution in the EU's decision-making machinery, remains persistently male-dominated. With more than 250 committees and working groups in COREPER, the highest female ratio has only reached 22 percent, a situation Kantola describes as the highest glass ceiling in the EU institutional system. This illustrates how even in the most advanced political systems, gender equality often encounters structural barriers precisely where power is most concentrated.

These findings feed into broader debates about the EU's identity as a political actor. While the Union likes to present itself as a normative power, especially in promoting democracy and equality,

Chappell and Guerrina (2020) argue that it is better understood as a gendered normative actor. This formulation captures the contradiction between the EU's rhetorical commitments to gender equality and its failure to embody those commitments in practice.

Former EU Communications Commissioner Margot Wallström famously expressed her frustration with this reality, denouncing what she called the EU's "reign of old men." Wallström lamented that "old men choose old men, as always" when it came to high-level appointments, and she pointed to the striking absence of women in the so-called "family photos" of EU summits. These blunt observations illustrate how male-dominated networks and elite reproduction continue to shape the Union's political culture, undermining its legitimacy as a gender-equal project.

Two recent volumes provide particularly important anchors for FEJUST's intellectual agenda. The first, *Feminist Framing of Europeanisation: Gender Equality Policies in Turkey and the EU*, co-edited with F. Melis Cin, demonstrates how EU gender equality norms are translated, negotiated, and often resisted in different national contexts. This work highlights the complex interplay between Europeanisation and domestic contestation. The second, *Anti-Gender Campaigns* edited by Roman Kuhar and David Paternotte, brings into focus the rising transnational backlash against gender equality, which now constitutes one of the most serious threats to EU commitments. Both works highlight the urgency of situating gender debates in the EU within a wider global struggle over knowledge, values, and legitimacy.

Despite the EU's successes in legislative innovation, the persistence of gendered hierarchies, the slow pace of cultural change, and the rising tide of anti-gender mobilisations raise urgent questions for the future of the Union. On the one hand, feminist scholars acknowledge that the EU has created institutional spaces for "layering" and empowered femocrats—women working inside institutions who gradually push for change (Minto and Mergaert 2018; Ansorg and Haastrup 2018). On the other hand, the EU's achievements remain fragile, partial, and constantly contested.

The study of gender politics in the EU is therefore not an optional supplement to mainstream EU studies. It is central to understanding what kind of Union Europe aspires to be. Gender equality functions as a litmus test of the EU's credibility as a democratic and inclusive project. If the EU fails to address its own gendered power asymmetries, its broader claim to normative authority—both internally and globally—will remain unfulfilled.

## OUTCOMES OF THE EU IMPACT ON GENDER EQUALITY POLICIES?

The promise of Europeanisation in the gender field has always been double-edged. On paper, accession conditionality and post-accession coordination appear to supply strong levers for change—clear directives, monitoring templates, and funding lines that should, in theory, generate convergence toward equality norms. Yet, as the literature repeatedly shows, the lived outcomes are far more ambivalent. Conditionality often encourages governments to treat gender equality as a compliance checklist rather than a democratic transformation project. Ministries transpose directives, draft equality strategies, and create institutional "machineries" that satisfy formal requirements, but the spirit of reform is undercut by procedural minimalism and thin resourcing. Once the grand prize of full membership is achieved and credible incentives diminish, the energy behind gender reforms frequently stalls. This is the first layer of the puzzle: why does a seemingly powerful external anchor yield shallow or reversible change?

A second layer concerns who sits at the EU decision-making table and how interests are aggregated. Women remain under-represented where the most consequential choices are made—particularly in the Council configurations and COREPER working parties—so the translation of social concerns into binding bargains is filtered through leadership spaces that remain male-dominated. In parallel, the EU's economic integration logics—competition, market freedom, fiscal discipline—tend to trump social and care concerns in agenda setting (Elomäki 2015; Dobrotić et al. 2013). Even when equality is advanced, it is often reframed to fit competitiveness narratives (e.g., women's employment as a growth driver) rather than a rights-based redistribution of power and resources.

A third layer exposes issue blindness in the private sphere. Scholarship notes that Europeanisation has devoted disproportionate attention to anti-discrimination in the labour market while devoting less sustained effort to the gendered organisation of care, household labour, reproductive rights, and violence in intimate settings (Chiva 2009; Gerber 2010). The public/private divide thus survives inside policies that otherwise look progressive. Finally, social learning has not taken root in a way that would consolidate norms from within. Networks meant to diffuse best practices are gendered in composition and culture, often convening elites who already agree; broader publics encounter equality frames episodically or as technocratic jargon. In this environment, norm resonance weakens, particularly as anti-gender campaigns supply compelling counter-frames that translate easily into everyday moral language. The emerging puzzle, then, is not whether the EU can trigger change—it can—but why these changes are repeatedly partial, reversible, and vulnerable to backlash.

## FROM THE LITERATURE: CAN THE EU BE A FEMINIST ACTOR?

Whether the EU can be considered a feminist actor depends on how we define feminism normatively and instrumentally. If the bar is set at passing progressive legislation, funding equality initiatives, and mainstreaming gender within policy cycles, the EU has an impressive record. Yet the critical literature asks a harder question: does the Union shift power relations, protect and expand women's and LGBTQI+ rights in moments of contestation, and transform the institutions that produce inequality? Here the evidence is uneven. The European Parliament's own research services documented significant backlash against women's and girls' rights and equality norms in a group of member states—Austria, Hungary, Italy, Poland, Romania, Slovakia—showing that core commitments can erode in the face of organised opposition. A feminist actor must be able to anticipate this erosion, marshal coalitions across levels, and impose political and legal costs on norm subversion. The EU does this sometimes—through infringement procedures, funding conditionalities, or strategic litigation support—but not consistently, and not with the speed and clarity that a rights-protection paradigm would demand.

A second condition is internal coherence. An entity cannot be feminist externally while tolerating patriarchal logics internally. Joanna Kantola's work documents real but incomplete parity gains in the Parliament and Commission, alongside the persistent masculinisation of the Council. If appointment politics remain locked in "old men choose old men" dynamics, as Margot Wallström memorably put it, then claims to feminist actorness are aspirational rather than descriptive. A third condition is intersectionality and materiality. Feminist action must centre those at the sharpest end of inequality—racialised women, migrants, care workers, LGBTQI+ persons—in both agenda setting and budgetary allocations. Where equality is framed primarily through market utility or elite parity, it risks bypassing the structural redistribution that feminist theory calls for. Thus, the EU can behave like a feminist actor episodically and sectorally, but the literature stops short of a categorical endorsement because the Union's response is inconsistent, selective, and frequently constrained by intergovernmental vetoes.

The norm-diffusion story contends that actors internalise equality through repeated interaction in EU-sponsored networks—committees, peer reviews, expert groups—gradually shifting preferences and identities. Feminist research adds three cautions. First, the networks themselves are gendered spaces. Access is unequal; styles of communication privilege expertise coded as masculine; and the costs of participation weigh differently across gendered career paths. Socialisation thus reproduces, rather than dissolves, boundary markers. Second, norm legitimacy is not given; it is contested daily. Equality becomes persuasive when it connects to lived experiences, values, and problem-solving frames that make sense outside Brussels. If equality remains an elite idiom, it will not survive electoral cycles. Third, norm resonance is multi-level and multidimensional. In societies with deep ideological divides about modernity and conservatism, the same equality message can empower one audience and antagonise another. Feminist scholars therefore recommend analysing not only the presence of networks but their composition, languages, rituals, and lines of accountability. Social learning that does not engage with religion, nationalism, family, and sovereignty frames will be quickly out-competed by actors who do.

A feminist framing begins by shifting the evaluative gaze from formal compliance to substantive equality. Rather than counting laws or committees, it asks whether women and LGBTQI+ persons gain decision-making power, bodily autonomy, material security, and freedom from violence. This requires



qualitative indicators that track who speaks and who benefits: the share of women in agenda-setting roles; the distributional effects of childcare and leave policies; litigation outcomes and enforcement intensity; and the budgetary weight of equality commitments relative to other priorities. Such a framing also contests the comfort of rights-as-text without rights-as-practice. As O'Neill warned, abstract rights that cannot be secured in practice are performative rather than protective; outcome equality—not simply opportunity equality—must be visible in evaluation.

Institutionally, a feminist EU would embrace feminist institutionalism as a design principle, not merely a diagnostic tool. That means parity and diversity in appointments across all Council formations and COREPER; transparency in selection pipelines; and sanctions for non-compliance with parity targets. It also means cultivating and protecting femocrats—insiders who advance equality—through stable mandates, ring-fenced budgets, and career incentives. Finally, feminist Europeanisation remembers the virtuous triangle that historically powered gains: EU institutions, national equality machineries, and women's movements/academia. When these three corners are connected, reforms root downward as well as upward. Strengthening domestic movements and knowledge producers is not an optional “add-on”; it is the condition for norm survival.

Methodologically, FEJUST adds a fourth corner to this triangle: epistemic justice. Who frames the problem? Whose knowledge counts in drafting, monitoring, and evaluating? A feminist, decolonial lens requires “epistemic audits” of EU processes to surface silences and exclusions, and to build participatory mechanisms—citizens' panels, deliberative forums, community-based research—that translate equality into everyday languages.

## ANTI-GENDER IDEOLOGY AND THE FRAGILITY OF “TOP-DOWN” EQUALITY

One of the strongest arguments for taking gender politics seriously in the EU is the simple fact that equality norms, however advanced on paper, remain vulnerable to contestation. Anti-gender movements provide a stark reminder that norms imposed from the top down are never immune to resistance. For decades, EU institutions have promoted gender equality through directives, accession conditionality, and mainstreaming strategies. Yet these policies have often been perceived not as collective achievements, but as external impositions crafted by distant elites.

Anti-gender ideology mobilises precisely against this image of top-down governance. By framing gender equality as an alien agenda exported from Brussels, it taps into broader anxieties about sovereignty, national identity, and tradition. Conservative religious actors and nationalist parties argue that EU equality norms undermine “authentic” cultural values and impose secularism on the public sphere. What makes these narratives powerful is not only their emotional appeal but also their ability to recast equality itself as undemocratic—as something dictated by elites rather than deliberated by citizens.

This matters deeply for the study of EU gender politics. If equality is perceived as technocratic conditionality rather than social consensus, it becomes easy to delegitimise. The familiar language of rights and directives can be turned against feminists, with opponents claiming to defend “freedom of speech, conscience, and parental rights” against what they portray as gender dogma. In such contexts, even long-standing achievements—anti-discrimination law, reproductive rights, protections for LGBTQI+ communities—can be rolled back with surprising speed.

The lesson here is not simply that anti-gender actors are strong, but that EU equality politics remain fragile because of their top-down character. Studying gender in the EU is therefore essential not only to track progress but also to expose the limitations of technocratic governance in the face of politicised backlash. It compels us to ask how equality norms can gain deeper legitimacy—how they can resonate with diverse publics, be anchored in lived experiences, and survive democratic contestation.

In other words, the rise of anti-gender ideology is not just a challenge “out there” in member states; it is a mirror reflecting the structural weaknesses of EU gender politics themselves. To understand the future of the EU, we must study how gender equality is constructed, resisted, and re-imagined across multiple levels of governance.



## VIDEO SOURCES

To complement this week's lecture, the following videos provide accessible insights into the concepts we have discussed. Each resource is linked to the course objectives, helping you consolidate your understanding of epistemic injustice, feminist waves, and their relationship to development.

Gender balance in the European elections — This video looks at how many EU member states have legislated quotas to increase gender-balanced representation in European Parliament elections.

What the European Parliament has achieved for gender ... — A discussion involving Helena Dalli (Commissioner for Equality) about gender equality in the EP and recent achievements.

S3E23 – Gender equality and the future of Europe: where are ... — A more journalistic / public-facing discussion of where the EU stands on gender equality and what the future holds.

The threat of anti-gender movements in Europe — A video discussing the emergence and proliferation of anti-gender movements in Europe, which is relevant to your point about vulnerability of equality norms.

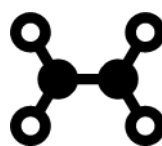
Slipping Off or Turning the Tide? Gender Equality in EU ... — Part of a lecture series on Gender & Sexuality; this is relevant for framing debates about whether EU policy is being pushed forward or being undermined.

Ursula Hirschmann Lecture 2022: Reflections on Gendered Democracies in Europe — A more academic lecture by Anna Gwiazda (King's College London) looking at gendered aspects of European democracies: representation, rights, backlashes.



## STUDY QUESTIONS

1. The EU is often celebrated as a leader in promoting equality—does this reputation hold when we examine its internal gender politics? Why or why not?
2. How does women's under-representation in EU decision-making bodies affect the credibility of the Union as a democratic and inclusive project?
3. What does the persistence of a rhetoric–implementation gap in EU gender policies reveal about the limits of Europeanisation?
4. Why do anti-gender campaigns gain traction in some EU member states, and what does this suggest about the fragility of top-down equality norms?



## THE ORIGINS AND DEVELOPMENT OF NON-DISCRIMINATION DIRECTIVES IN THE EU

The history of gender equality law in the European Union is full of paradoxes. It is tempting to imagine that the EU, often celebrated as a global leader in equality promotion, began with a principled commitment to women's rights. Yet the reality is more complicated. The origins of EU gender equality lie in a clause on equal pay for equal work in the Treaty of Rome (1957) — not introduced to advance feminist goals, but to prevent unfair competition in the common market. Equality, in other words, entered the EU's DNA through an economic rationale rather than a moral or social one.

Over the following decades, however, this narrow clause became the foundation for an expansive body of law. The equal treatment era of the 1970s to 1990s produced directives on workplace equality, maternity protection, parental leave, and occupational pensions. Feminist lawyers and activists used the Court of Justice of the EU to reinterpret Article 119 as a rights-based tool, most famously in the Defrenne case. By the 1990s, gender equality was reframed not just as an employment issue but as part of the EU's commitment to good governance, democratic legitimacy, and social justice.

The introduction of gender mainstreaming in the Treaty of Amsterdam (1997) marked a constitutional breakthrough. For the first time, the EU committed itself to integrating gender considerations across all its policies — from trade and agriculture to development and foreign affairs. What began as a market-corrective device gradually transformed into a governance principle and later, with the Charter of Fundamental Rights (2000) and the Lisbon Treaty (2009), into a constitutional obligation.

Yet this trajectory is not a straightforward story of progress. Economic competitiveness has remained a central justification for women's employment, limiting the transformative potential of EU gender politics. Gender equality is everywhere in EU law, but often in a diluted, instrumentalised form. This ambivalence — between market logics and feminist visions of justice — is central to understanding the EU as both a normative actor and a gendered institution.

## Guiding Questions

1. Why do you think the EU's commitment to equal pay in 1957 was based on economic competitiveness rather than a concern for women's rights — and how does this origin shape EU equality policy today?
2. How can a clause inserted for purely market reasons (Article 119) become a cornerstone of feminist legal mobilisation in Europe? What does this tell us about the unintended consequences of law?
3. When the EU justifies gender equality in terms of growth, productivity, and competitiveness, does this strengthen or weaken the case for equality? What are the risks of such an instrumental framing?
4. Gender mainstreaming aimed to make equality a cross-cutting obligation across all EU policies. Do you think this strategy represents genuine feminist progress, or does it risk turning gender into a bureaucratic “tick-box” exercise without real transformative power?



**Guiding  
Questions**

## THE ECONOMIC ORIGINS OF THE EU GENDER EQUALITY LAW

When discussing the history of gender equality in the European Union, many assume it began as a rights-based commitment to women's emancipation. Yet, paradoxically, its origins lie elsewhere — in the economics of market integration.

The principle of “equal pay for equal work” was enshrined in the Treaty of Rome (1957) under Article 119. On paper, this appeared revolutionary: a founding treaty of the European Economic Community (EEC) recognising women's right to equal treatment in the workplace. However, the underlying rationale was not rooted in feminist struggles for justice but in concerns about fair competition within the common market. At the time, some member states — notably France — already had domestic laws guaranteeing equal pay. French officials were concerned that if other member states allowed lower wages for women, they would enjoy an unfair comparative advantage in trade and production. To prevent “social dumping,” the equal pay clause was inserted into the treaty. Thus, Article 119 served primarily to ensure a level playing field in market integration. The logic was simple: if women could be paid less in one country than another, then labour costs would vary in ways that distorted competition. Gender equality, in this context, was framed as an economic necessity rather than a social or moral imperative.

This starting point created an enduring tension in EU gender politics. On one hand, the clause became a legal foothold for later feminist advocacy. Women's organisations, trade unions, and lawyers could point to Article 119 to challenge pay discrimination. On the other hand, because the clause was introduced for economic reasons, EU institutions tended to treat gender equality as an instrumental issue: important only insofar as it supported economic integration and competitiveness.

Feminist scholars like Sonia Mazey (1998) and Emanuela Lombardo (2003) have shown how this economic framing limited the transformative potential of EU gender policy. It meant that equality was not pursued for its own sake but was subordinated to the broader goal of market-building. Interestingly, the European Court of Justice (ECJ) soon played a pivotal role in reinterpreting Article 119 beyond its original economic logic. In the landmark *Defrenne v. Sabena* (1976) case, the Court ruled that Article 119 had direct effect, meaning individuals could invoke it before national courts. This empowered women workers to use EU law to challenge wage discrimination, effectively transforming a market clause into a rights-based tool.

The *Defrenne* ruling is often considered the real beginning of EU gender equality law. It demonstrated that EU institutions — sometimes unintentionally — could become sites of feminist gains,

even when the initial motivation was not feminist. The case also signalled that litigation would be a recurring strategy for advancing equality at the EU level, often more effective than political negotiation.

From the 1950s onwards, gender equality gradually shifted from being framed as a market-unifier to being articulated as a fundamental right (Elomäki 2015: 290). However, this shift was slow and contested. For decades, economic justifications dominated policy discourse, reinforcing the idea that women's participation in the labour market was valuable primarily because it enhanced productivity and growth. The tension between instrumental economic logic and normative justice claims continues to shape EU gender politics to this day. When the EU champions women's employment as a way to boost GDP, critics argue that it reproduces the same logic as Article 119: women are valued insofar as they serve the economy, not because they deserve equality as citizens.

*Do you think making gender equality “everyone’s responsibility” through mainstreaming strengthens the cause of equality — or does*



For students of EU politics and gender, this economic origin is not just a historical curiosity — it explains much about the ambivalent character of the EU as a gender actor. It shows why EU equality policies often appear strong on paper but weak in practice, and why economic competitiveness is frequently invoked to justify gender reforms. Most importantly, it reveals a paradox: a clause inserted for reasons of market fairness eventually became a cornerstone for feminist advocacy at the supranational level. What began as an instrumental device has since evolved into a legal and normative foundation for one of the EU's most developed social policy fields.

## FROM EQUAL TREATMENT TO GENDER MAINSTREAMING

The period between the mid-1970s and the early 2000s marked a decisive shift in EU gender equality law. What began as a narrow principle of equal pay (Article 119, Treaty of Rome) developed into a more complex legal and policy framework covering multiple dimensions of equality. This phase is often described as the “equal treatment era,” when the EU sought to expand its directives beyond pay to cover other forms of gender-based discrimination in employment and social rights.

### ***The Equal Treatment Era: 1975–2000***

The EU's first directive in this area was Directive 75/117/EEC (1975), which sought to implement the principle of equal pay for equal work. This was followed quickly by Directive 76/207/EEC (1976) on equal treatment of men and women regarding access to employment, vocational training, promotion, and working conditions. These directives consolidated the ECJ's Defrenne jurisprudence, obliging member states to adopt national measures that explicitly prohibited workplace discrimination.

Through the 1980s and 1990s, a body of directives steadily broadened the scope of EU gender equality law. These included:

- Equal treatment in occupational social security schemes (Directive 86/378/EEC),
- Maternity protection and pregnant workers (Directive 92/85/EEC),
- Minimum parental leave standards (Directive 96/34/EC, based on a framework agreement between social partners).

Each directive required transposition into national law, creating harmonised minimum standards across member states. For many countries, especially in Southern and Eastern Europe, this meant introducing entirely new rights that had not existed before at the national level. As Chappell and Guerrina (2020) stress, this legislative wave was “very important” because it tied equality not just to pay, but to the conditions of work, social protection, and family responsibilities.

### ***The Rhetorical Shift: Rights vs. Economic Efficiency***

By the early 1980s, EU institutions began to acknowledge women's right to participate in employment and contribute to the economy as citizens. However, by the 1990s, the dominant justification shifted again: women's participation was increasingly promoted in terms of its macroeconomic benefits.

In the wake of globalisation, demographic change, and competitiveness concerns, the EU began to argue that excluding women from the labour market represented a "waste of talent" and a drag on productivity. Gender equality was therefore reframed as a solution to labour shortages, ageing populations, and the need for innovation.

Feminist scholars have been sharply critical of this framing. Sylvia Walby (2004) and Emanuela Lombardo (2003) argue that reducing gender equality to an economic instrument risks sidelining deeper issues of power, justice, and redistribution. Women were welcomed into the labour force not because of a principled commitment to emancipation but because their labour was needed for growth.

### ***The Rise of Good Governance and Institutional Reform***

The 1990s also saw the rise of the "good governance" agenda within the EU, linked to broader reforms around transparency, accountability, and democratic legitimacy. In this climate, gender equality was reframed as an issue of governance quality: an institution that ignored half of its population could not claim to be democratic or effective.

This discursive context provided fertile ground for the concept of gender mainstreaming, a strategy that originated in international institutions such as the United Nations (Beijing Platform for Action, 1995) but was quickly taken up at the EU level. A key moment came in December 1995, when the EU adopted the Council Resolution on Integrating Gender Equality Issues in Development Cooperation. This resolution marked a turning point, signalling that gender equality should not be confined to specific directives but should be integrated horizontally across all policy fields.

This laid the groundwork for the Treaty of Amsterdam (1997), which formally adopted gender mainstreaming as a legal and institutional principle of the EU. Article 3(2) TEC (now Article 8 TFEU) declared: *"In all its activities, the Community shall aim to eliminate inequalities, and to promote equality, between men and women."* This was a constitutional breakthrough. For the first time, gender equality was no longer confined to social policy or employment—it became a cross-cutting obligation across all EU activities, from agriculture and trade to foreign policy.

### ***Gender Mainstreaming: A New Paradigm?***

Gender mainstreaming represented a conceptual leap. It recognised that all policies—whether economic, fiscal, social, or foreign—have gendered effects. It required policymakers to consider how seemingly neutral measures (such as taxation, transport, or trade agreements) might produce different outcomes for women and men.

According to Shreeves (2019: 1), gender mainstreaming is about "mobilising all general policies and measures specifically for the purpose of achieving equality." In principle, this approach should have transformed EU governance, embedding equality into every stage of policy design, implementation, and evaluation. In practice, however, feminist scholars have noted serious limitations. Gender mainstreaming often became bureaucratised, technocratic, and under-resourced. Without political will, it risked being reduced to "tick-box" exercises or rhetorical commitments. As Mieke Verloo (2005) argues, mainstreaming can depoliticise feminist struggles by treating gender as a technical variable rather than a structural relation of power.

### ***Why the Equal Treatment–Mainstreaming Transition Matters***

The transition from equal treatment to gender mainstreaming is significant for several reasons:

**Expansion of Scope** – The EU moved from narrow equal pay provisions to a multi-dimensional regime addressing employment, social protection, family life, and violence against women.

**Legal Consolidation** – A dense body of directives and treaty provisions created enforceable rights across member states.



Shift in Justification – The framing of gender equality evolved from economic competitiveness to governance legitimacy and fundamental rights.

New Challenges – Mainstreaming broadened ambitions but also risked dilution, as equality became “everyone’s responsibility” and therefore often nobody’s priority.

## INSTITUTIONALISATION OF GENDER EQUALITY IN THE EU FRAMEWORK

By the turn of the millennium, the European Union had reached a point where gender equality was no longer a marginal social issue or a question of employment legislation. Instead, it had become woven into the very fabric of the Union’s legal and institutional architecture. This stage of development can be described as the institutionalisation of gender equality, where equality was not only a matter of directives but also a core principle of EU governance, enshrined in its constitutional order and tied to the Union’s legitimacy as a political project.

The most important breakthrough in this regard came with the Charter of Fundamental Rights of the European Union (2000). For the first time, the EU formally presented itself as a community of values, not just of markets and economic cooperation. The Charter placed equality alongside dignity, freedom, and solidarity as one of the Union’s fundamental principles. Within the Charter, Article 23 stated unequivocally that equality between women and men must be ensured in all areas, including employment and remuneration. This was a crucial step because it elevated gender equality from being a policy goal to being a legal right guaranteed at the highest constitutional level.

At the same time, the Union began to develop strategic frameworks to give coherence and direction to its growing equality agenda. In 2000, the EU adopted its Framework Strategy for Gender Equality, which positioned the Union as a promoter of equality across five interlinked spheres: economic life, political participation, access to social rights, participation in civil life, and the transformation of gender roles. Unlike earlier directives that dealt with specific forms of workplace discrimination, this strategy recognised the multi-dimensional nature of inequality. It was also the first attempt to align legal commitments with proactive policy planning, signalling a more ambitious approach to equality promotion.

The adoption of the Charter and the Framework Strategy coincided with another critical moment: the launch of the Lisbon Strategy in 2000. This economic and social reform agenda sought to make the EU “the most competitive and dynamic knowledge-based economy in the world.” Gender equality was presented as an integral part of this ambition, but again largely through an economic lens. Women’s employment was framed as a way to boost growth, address demographic decline, and enhance competitiveness. This duality—the recognition of gender equality as a fundamental right on the one hand, and as an instrument of economic modernisation on the other—became one of the defining features of EU equality politics.

Building on the Framework Strategy, the EU introduced the Roadmap for Equality between Women and Men (2006–2010). This roadmap laid out a comprehensive agenda that included improving participation in decision-making, promoting equal economic independence, supporting the reconciliation of work and family life, eradicating gender-based violence, and combating stereotypes in society. It also sought to improve governance of gender equality policies, making sure that equality was mainstreamed into all areas of EU action. The Roadmap represented a more detailed and operational attempt to turn lofty treaty commitments into practical measures.

Institutionalisation also deepened through the EU’s treaties. The Treaty of Amsterdam (1997) had already embedded gender mainstreaming into Article 3(2) TEC, requiring the Union to eliminate inequalities and promote equality between men and women in all its activities. With the Lisbon Treaty (2009), this obligation was reaffirmed and further strengthened. Lisbon made the Charter of Fundamental Rights legally binding on member states when implementing EU law, giving Article 23 the force of hard law. It also expanded the Union’s objectives, explicitly committing it to promote equality between women and men as one of its foundational values.

The post-Lisbon period witnessed both consolidation and expansion of this institutional framework. On the one hand, the EU began to pay greater attention to areas previously considered outside the scope of gender equality law, such as decision-making in politics and the private sector, or combating gender-based violence. On the other hand, economic framings remained deeply entrenched. The EU continued to stress the benefits of women's employment for growth and competitiveness, a discourse reinforced by powerful actors such as the World Economic Forum and the World Bank, which promoted women's participation as a resource for economic modernisation.

Feminist scholars have highlighted both the achievements and the limitations of this institutionalisation. On the positive side, the EU established one of the most comprehensive supranational frameworks for gender equality in the world, creating binding obligations for member states and providing civil society with tools to demand accountability. On the critical side, the reliance on economic justifications and the bureaucratisation of gender mainstreaming often diluted feminist goals. Equality was formally everywhere, but substantively uneven.

This ambivalence speaks to a deeper question about the EU's identity. Is the Union a feminist actor genuinely committed to transforming gender relations, or is it a market actor that instrumentalises equality for economic ends? The institutionalisation of gender equality reflects both tendencies. On the one hand, it enshrines equality as a legal right and governance principle. On the other, it ties that right to the logic of competitiveness and growth, limiting its transformative potential.

In this way, the institutionalisation of gender equality within the EU framework is both a remarkable achievement and an ongoing puzzle. It shows how far the EU has travelled since the economically motivated clause of Article 119, but it also demonstrates the persistence of the economic rationale that shaped its origins. For students of EU politics, this ambivalence is not a weakness of analysis but a crucial entry point: it helps us understand the complexities of European integration, the tensions between market and social Europe, and the contested role of feminist agendas in supranational governance.

## CONCLUDING REFLECTION

The trajectory of EU gender equality law from the 1950s to the early 2000s tells a story of both progress and paradox. It began with an economically motivated clause—Article 119 of the Treaty of Rome—that was never intended as a feminist breakthrough. Its purpose was to prevent distortions in market competition, not to ensure justice for women. Yet, ironically, this narrow clause became the legal foothold upon which feminist lawyers, activists, and institutions would build one of the most extensive supranational equality frameworks in the world.

The equal treatment era of the 1970s to 1990s was transformative, expanding the scope of EU law from pay to employment conditions, social security, parental leave, and maternity protection. Through a steady flow of directives, national governments were compelled to adopt new standards, often creating rights that women had not previously enjoyed. At the same time, the discursive framing of equality shifted: what began as a question of fairness was increasingly justified in terms of economic efficiency and competitiveness. This economic lens brought visibility to women's labour but also reduced their participation to a matter of productivity rather than emancipation.

By the late 1990s and early 2000s, the EU had moved into a new phase: the institutionalisation of gender equality. Through the Treaty of Amsterdam, the Charter of Fundamental Rights, and strategic frameworks such as the 2000 Framework Strategy and the 2006–2010 Roadmap, equality became constitutionalised as both a legal right and a governance principle. Gender mainstreaming signalled a recognition that all policies—not only social ones—have gendered effects, embedding equality into the Union's institutional design.

Yet, throughout this trajectory, the shadow of Article 119's economic rationale never disappeared. Gender equality was repeatedly framed in terms of its contribution to growth, competitiveness, and modernisation. This created a paradox: while the EU established some of the strongest legal protections for women in the world, it often pursued them for reasons that fell short of feminist visions of justice.

For students of EU politics, this history is vital because it reveals how European integration is both an engine of social change and a site of contestation. Gender equality in the EU cannot be understood simply as a story of progressive advancement, nor as one of failure and backlash. It is a story of ambivalence, where economic logics, legal innovations, and feminist struggles are deeply entangled.

Understanding this ambivalence helps us appreciate why gender politics in the EU matters. It reminds us that laws and institutions can be both tools of empowerment and instruments of instrumentalisation, depending on how they are framed, implemented, and contested. And it shows that the future of EU gender equality will depend not only on what is written in treaties and directives, but on whether the Union can move beyond its economic origins to embrace equality as a fundamental, non-negotiable element of its democratic identity.



## VIDEO RESOURCES

International and European Law and Gender Equality 3 — This video introduces the role of human rights protections in European Communities law and early legal developments linking EU law with gender equality.

The EU promotes gender equality (EU playlist) — A playlist by the EU's Justice & Consumers group, with short videos on gender balance in corporate boards, equal pay, etc. Good for brief class illustrations.

How far have we come 30 years on? A comprehensive gender equality review — From EIGE's video library; good for reflecting on progress vs. outstanding challenges.

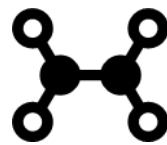
Timeline: Women's Rights in the EU — European Parliament video tracing key legal and policy milestones (equal pay, directives, etc.). Helpful for students to see the sequence.

Gender equality: are we there yet? — Shorter video discussing equal pay and related gender equality issues in current EU debates. Useful for raising questions about implementation vs rhetoric.

Building a Gender Equality Legacy from the von der Leyen Commission — Discusses more recent developments under the EU Commission, which helps connect the earlier history with what's happening now.

## STUDY QUESTIONS

1. How does the economic origin of Article 119 in the Treaty of Rome shape the trajectory of EU gender equality law? In what ways does this origin continue to influence the EU's approach to gender policy today?
2. To what extent did the Defrenne case transform Article 119 from an economic safeguard into a rights-based instrument? What does this case tell us about the role of the European Court of Justice in advancing gender equality?
3. Compare the equal treatment era (1975–2000) with the subsequent strategy of gender mainstreaming. How did the EU's legal tools, political justifications, and institutional frameworks change between these two phases?
4. Scholars often describe EU gender equality law as both a success story and a story of ambivalence. Do you agree? What evidence supports each side of this debate, and how should we interpret this ambivalence for the future of EU gender politics?



## FROM ECONOMIC COMPETITION TO FUNDAMENTAL RIGHTS

When the European Communities were first created in the 1950s, they were not imagined as projects of rights and democracy but as mechanisms of economic reconstruction and integration. The treaties said almost nothing about human rights, equality, or non-discrimination, reflecting the narrow economic logic of market-building. Yet over time, this silence became an opportunity. Through bold rulings, the European Court of Justice gradually constructed a doctrine of general principles of law, incorporating respect for fundamental rights even without explicit treaty provisions. What began as judicial improvisation evolved into a constitutional transformation: the EU came to present itself not merely as a common market, but as a community of rights.

This transformation reshaped the meaning of equality in the EU. Starting with a clause on equal pay inserted for competitive reasons, the Union expanded its agenda into directives on employment equality, maternity and parental leave, and eventually a much broader anti-discrimination framework encompassing race, religion, age, disability, and sexual orientation. In the process, equality was reframed from an economic safeguard into a matter of justice and legitimacy.

By the turn of the millennium, these developments crystallised in the Charter of Fundamental Rights (2000) and were later reinforced by the Lisbon Treaty (2009). Equality and non-discrimination became part of the EU's constitutional identity, binding on its institutions and on member states when implementing EU law. The creation of new agencies such as the Fundamental Rights Agency (FRA), the European Institute for Gender Equality (EIGE), and national equality bodies further institutionalised these commitments, embedding equality in the governance structures of the Union.



For students of EU politics, this trajectory matters not only as legal history but also as a case study of how supranational institutions can expand their competences and reshape political projects. What began as an economic market has become a polity with one of the most comprehensive equality regimes in the world. Yet this achievement is marked by ambivalence: the EU's equality framework is uneven, often instrumentalised for economic ends, and dependent on political will. Understanding this trajectory — from silence to judicial activism, from economic safeguards to constitutional rights, from isolated provisions to dense institutional structures — is key to grasping the EU's paradoxical identity as both a gendered and normative actor.

### Guiding Questions

1. Why might the absence of explicit human rights and equality clauses in the original treaties have created space for the European Court of Justice to play such an activist role? Was this judicial creativity a strength or a weakness for the legitimacy of the EU?
2. How does the evolution from sex equality in pay to a broader multi-ground non-discrimination framework reflect the changing self-image of the EU — from a common market to a community of rights?
3. Does the institutionalisation of equality through agencies like FRA and EIGE make the EU a stronger feminist actor, or does the absence of strong enforcement powers mean that equality remains more symbolic than substantive?



### Guiding Questions

## EARLY SILENCES AND JUDICIAL ACTIVISM

When the European Communities were first established in the 1950s, they were conceived almost exclusively as projects of economic integration. The Treaty of Paris (1951) establishing the European Coal and Steel Community and the Treaty of Rome (1957) establishing the European Economic Community (EEC) were drafted in the shadow of post-war reconstruction and Cold War rivalry. The central aim was to rebuild Europe through market integration and to bind states so closely together economically that future conflict would become unthinkable. Within this economic vision, human rights and non-discrimination had virtually no place.

The Treaty of Rome did contain one notable exception: Article 119, which required equal pay for men and women for equal work. But this was not intended as a sweeping statement of women's rights. Rather, it reflected French insistence on protecting its domestic industries from unfair competition. Since France already had robust equal pay laws, it feared that other member states could gain a competitive edge by paying women less. What later became celebrated as the cornerstone of EU gender equality law thus began as an economically motivated provision. Beyond this clause, however, the treaties were silent on rights. There was no reference to human rights, democracy, or even to the idea of equality as a general principle.

This silence became increasingly untenable as Community law expanded its reach. By the late 1960s, individuals and businesses were invoking European law in national courts to challenge national measures, and in some cases these claims raised fundamental rights concerns. Could Community law, which had primacy over national law, override constitutional protections in member states? Could the pursuit of market integration lead to violations of basic rights?

The European Court of Justice (ECJ, later CJEU) was forced to respond. In a series of cases beginning in the late 1960s, it declared that respect for fundamental rights was part of the "general principles of Community law." This was a remarkable act of judicial activism, since there was no explicit treaty basis for such principles. In *Stauder v. City of Ulm* (1969), the Court held that fundamental rights were enshrined in the general principles of Community law and therefore protected by the Court. In *Internationale Handelsgesellschaft* (1970), it went further, stating that even national constitutional



rights could not undermine the supremacy of Community law — but at the same time promising that Community law itself would respect fundamental rights derived from the “common constitutional traditions of the Member States.” In *Nold v. Commission* (1974), the Court made explicit reference to international treaties, especially the European Convention on Human Rights (ECHR), as sources of inspiration.

Through these cases, the Court effectively filled the vacuum left by the treaties. It reassured member states and citizens that Community law would not trample on rights, while at the same time consolidating the supremacy and autonomy of EU law. This was a strategic balancing act: by borrowing legitimacy from national constitutions and the ECHR, the Court strengthened the authority of European law without formally amending the treaties. The consequences for non-discrimination were profound. Although the treaties mentioned equality only in relation to pay, the Court’s doctrine of general principles created a constitutional foundation that could later support a much broader set of equality rights. In essence, the Court constitutionalised equality by stealth, transforming what had been an economic project into a legal order that claimed to uphold fundamental rights.

From a theoretical perspective, this moment highlights the transformative power of courts in integration processes. The ECJ did not simply interpret existing provisions; it invented new doctrines to preserve the coherence of the Community legal order and to build trust among member states. This judicial activism exemplifies what scholars call the “constitutionalisation” of the EU through case law, a process by which the Court gradually endowed the European project with attributes of a constitutional system, even before member states had agreed to them politically.

In retrospect, the early silence of the treaties on human rights proved to be less a limitation than an opportunity. It allowed the Court to shape a rights framework that was flexible, adaptive, and rooted in shared traditions. By the time member states began to revise the treaties in the 1990s to include explicit human rights clauses, the Court had already established a robust case law on rights and non-discrimination. What had begun as a gap in the legal architecture had become the foundation for one of the most sophisticated supranational rights regimes in the world.

## EARLY FROM SEX EQUALITY TO A WIDER NON-DISCRIMINATION AGENDA

Although the European Court of Justice’s doctrine of general principles created a foundation for rights, the actual story of non-discrimination law in the EU begins more narrowly with sex equality in the workplace. As noted earlier, Article 119 of the Treaty of Rome established the principle of equal pay for men and women for equal work. While it was originally motivated by fears of competitive disadvantage, this provision provided the crucial foothold for feminist legal mobilisation and judicial activism.

The 1970s marked a turning point. In *Defrenne v. Sabena* (1976), the Court declared that Article 119 was directly effective, meaning individuals could invoke it before national courts. This decision dramatically expanded the reach of EU law: it was no longer a distant commitment between governments but a right enforceable by individuals against employers. Importantly, the Court framed equal pay not only as an economic safeguard but as part of the EU’s broader social objectives, recognising equality between men and women as a fundamental principle of the Community. This moment is often described as the birth of EU gender equality law.

Following *Defrenne*, the European Community began to adopt directives that fleshed out sex equality in employment. The Equal Treatment Directive of 1976 (76/207/EEC) prohibited discrimination in access to employment, training, promotion, and working conditions. Other directives soon followed, addressing maternity leave, parental leave, and occupational social security schemes. By the late 1980s, a body of secondary legislation had developed that made the EU a significant actor in gender equality, particularly in the labour market.

Yet until the late 1990s, non-discrimination law remained relatively narrow. It was almost entirely focused on sex discrimination in employment and social security, with very limited extension beyond the workplace. Moreover, other grounds of discrimination — race, religion, disability, age, or

sexual orientation — were absent from the legal framework. The EU's competence was restricted, and its interventions were often justified primarily in economic terms: ensuring a level playing field within the internal market, rather than advancing equality as a social or moral goal.

This changed dramatically with the Treaty of Amsterdam (1997). For the first time, the treaties gave the EU explicit competence to combat discrimination on a wide range of grounds. Article 13 of the Treaty establishing the European Community (now Article 19 TFEU) empowered the Council to take appropriate action to fight discrimination based on sex, racial or ethnic origin, religion or belief, disability, age, or sexual orientation. This marked a decisive expansion from a narrow focus on gender and nationality to a much broader human rights agenda.

The Amsterdam Treaty was quickly followed by landmark legislation. In 2000, the EU adopted two crucial directives that reshaped the landscape: the Racial Equality Directive (2000/43/EC) and the Employment Equality Directive (2000/78/EC). Together, they created a comprehensive framework that prohibited discrimination not only in employment but also, in the case of race and ethnicity, in education, social protection, healthcare, and access to goods and services. This was a significant step forward, recognising that equality in the labour market cannot be achieved without addressing wider structural barriers in society.

These directives also introduced new institutional requirements. Member states were obliged to establish equality bodies to provide assistance to victims of discrimination and to promote equal treatment. This requirement laid the groundwork for the later development of Equinet, the European Network of Equality Bodies, and reinforced the role of civil society actors in monitoring compliance.

The adoption of the 2000 directives reflected both internal and external pressures. Internally, there was recognition that the EU needed a stronger social dimension to balance the emphasis on market integration. Externally, the EU was presenting itself as a global promoter of human rights, especially in the context of enlargement and relations with third countries. Demonstrating a strong commitment to non-discrimination was therefore politically strategic as well as normatively important.

Nevertheless, significant limitations remained. Some grounds of discrimination, such as sexual orientation or religion, were only protected in the sphere of employment, not in access to goods and services. Attempts to extend protection more broadly through a so-called Horizontal Directive have repeatedly stalled, blocked by member states unwilling to accept further obligations. Similarly, gender equality measures often stopped short of addressing structural inequalities in unpaid care work, representation in decision-making, or violence against women.

From a feminist perspective, this expansion of EU law raises ambivalent questions. On the one hand, the EU became a powerful driver of equality, pushing member states to adopt stronger protections than they might have enacted on their own. On the other hand, the framing of non-discrimination often remained instrumental and economistic. Many of the legal provisions were justified in terms of labour market efficiency, competitiveness, and the functioning of the internal market, rather than as matters of justice or dignity. In this sense, the EU's equality agenda has always been caught between economic rationales and normative commitments.

By the early 2000s, then, the EU had moved far beyond its original silence on rights. What began as a narrow clause on equal pay had evolved into a multi-ground non-discrimination regime, supported by directives, institutions, and judicial enforcement. Yet the agenda was — and remains — uneven. Some groups are better protected than others, and the balance between economic integration and social justice continues to shape the scope and ambition of EU non-discrimination law.

## CONSTITUTIONALIZING EQUALITY

The turn of the millennium marked another decisive step in the EU's non-discrimination and equality agenda with the adoption of the Charter of Fundamental Rights of the European Union in 2000. For the first time, the EU sought to codify in a single, visible document the full range of rights that individuals could claim within the Union's legal order. This was an important symbolic gesture: it signalled that the EU was no longer simply a technocratic market project but a political community that aspired to be anchored in values, rights, and citizenship.

The origins of the Charter lie partly in the EU's own legitimacy crisis. By the late 1990s, there was growing public concern that the Union was too remote from its citizens, too focused on market integration, and too weak in its social commitments. The drafting of the Charter was intended to make rights more visible and to bring citizens "closer to the EU." Its drafters drew inspiration from multiple sources: the constitutions of the member states, the European Convention on Human Rights (ECHR), and international treaties such as the UN Convention on the Rights of the Child. In this sense, the Charter reflected a hybrid of European constitutional traditions and international human rights law.

Of particular relevance to gender equality is the section of the Charter titled "Equality" (Articles 20–26). Here, the Charter affirms the principle of equal treatment before the law (Article 20), prohibits discrimination on a wide range of grounds including sex, race, ethnic origin, religion, disability, age, and sexual orientation (Article 21), and explicitly guarantees equality between women and men (Article 23). The latter goes further than many national constitutions, affirming not only formal equality but also the legitimacy of positive action to promote equality in practice. In addition, the Charter recognises the rights of children (Article 24) and the rights of older people (Article 25), embedding a broad conception of equality across the life course.

However, when first proclaimed in 2000, the Charter had the status of a political declaration rather than binding law. It expressed the Union's aspirations but could not be invoked directly before courts. This changed with the Treaty of Lisbon (2009), which gave the Charter the same legal value as the EU treaties. From that point onwards, the Charter became a binding constitutional document for the EU. Article 51 of the Charter requires both EU institutions and member states to respect its provisions whenever they are implementing EU law. In practice, this means that the Charter has become a crucial reference point for the Court of Justice of the European Union (CJEU) and for national courts dealing with issues that fall within the scope of EU law.

One of the most important provisions in this respect is Article 21, the general prohibition of discrimination. Individuals can now challenge EU legislation, or national legislation that implements EU law, if it is inconsistent with this principle. Moreover, national courts can refer questions to the CJEU under Article 267 TFEU for guidance on how to interpret EU law in light of the Charter. This gives the Charter a powerful role in shaping the interpretation and development of equality law across Europe.

Yet the Charter is not without limitations. Its scope is restricted: member states are only bound by the Charter when acting within the field of EU law. This means that purely national measures, outside the EU legal framework, cannot be challenged under the Charter. Moreover, there is a persistent tension between the Charter and the ECHR. While both instruments cover many of the same rights, the EU has not yet acceded to the ECHR, and questions of overlap and hierarchy remain politically sensitive.

From a feminist perspective, the Charter represents both progress and unfinished business. On the one hand, it provides a strong constitutional affirmation of gender equality, recognising it as a principle of the highest order within the EU legal system. It legitimises positive action and sets out a broad prohibition of discrimination that goes beyond sex to encompass other intersecting grounds. On the other hand, the Charter still reflects the EU's cautious approach: it constitutionalises existing rights but does not radically extend them. Critics argue that it remains too focused on market-related dimensions of equality and that enforcement depends heavily on the willingness of individuals to litigate and of courts to interpret the provisions expansively.

Nonetheless, the Charter has changed the symbolic and legal landscape. It anchors equality and non-discrimination not just in secondary legislation but in the constitutional identity of the EU. It also provides a reference point for social movements, NGOs, and equality bodies to mobilise claims. In this sense, the Charter is not only a legal document but also a political resource. It allows citizens to frame their demands in the language of rights and obliges the EU to defend its self-image as a community founded on dignity, freedom, democracy, equality, the rule of law, and respect for human rights.

## INSTITUTIONALISING EQUALITY: FRA, EIGE, EQUINET, AND NATIONAL EQUALITY BODIES

The evolution of EU non-discrimination law did not stop with the adoption of directives and the constitutionalisation of rights in the Charter. Laws and principles, however sophisticated, remain ineffective if there are no institutions to implement them, no data to track their progress, and no bodies to assist individuals in claiming their rights. For this reason, the 2000s saw the gradual creation of a dense institutional infrastructure designed to promote, monitor, and enforce equality across the European Union. These institutions exist both at the supranational level, with EU agencies dedicated to fundamental rights and gender equality, and at the national level, where equality bodies were established or designated under EU law. Together, they form the backbone of the Union's equality regime, but their effectiveness varies and their role remains contested.

### ***The European Union Agency for Fundamental Rights (FRA)***

The FRA was established in 2007, building on its predecessor, the European Monitoring Centre on Racism and Xenophobia. Its mandate is to provide independent, evidence-based advice to EU institutions and member states on fundamental rights issues. Unlike the CJEU, which deals with individual cases, the FRA's role is primarily to collect data, conduct surveys, identify trends, and publish reports that inform policymaking.

For example, the FRA has conducted some of the largest comparative surveys of minority and vulnerable groups in Europe, such as the EU-MIDIS surveys on discrimination against ethnic minorities and migrants, and surveys on violence against women. These data collections are crucial because many member states either lack reliable statistics or are reluctant to gather information on sensitive issues such as ethnicity. By providing robust, cross-national data, the FRA makes visible the structural inequalities that persist across Europe and supplies the empirical foundation for EU and national policy interventions.

At the same time, the FRA has no enforcement powers. It cannot sanction member states for non-compliance or force them to act. Its influence depends on the credibility of its expertise and the willingness of policymakers to heed its advice. Critics argue that this makes the FRA a "soft" institution, more a knowledge producer than a rights enforcer. Yet in a political climate where evidence is contested, the FRA's independent research capacity remains an essential component of the EU's equality infrastructure.

### ***The European Institute for Gender Equality (EIGE)***

If the FRA addresses fundamental rights broadly, the European Institute for Gender Equality (EIGE) focuses specifically on gender. Established in 2010 and based in Vilnius, Lithuania, EIGE's mandate is to support the promotion of gender equality, fight discrimination based on sex, and raise awareness of gender issues across the EU. Like the FRA, it does not enforce rights directly but acts as a knowledge hub and policy support body.

EIGE is perhaps best known for its Gender Equality Index, published regularly since 2013. The index measures progress on gender equality across member states in six core domains: work, money, knowledge, time, power, and health, as well as intersecting inequalities. By providing a comprehensive, comparative measure, the index has become a key reference point for policymakers, researchers, and activists. It allows progress to be tracked over time, highlights persistent gaps, and puts pressure on lagging member states.

Beyond the index, EIGE develops indicators on issues such as gender-based violence, collects best practices, and provides training and resources for policymakers. Its work ensures that gender mainstreaming — enshrined in the Treaty of Amsterdam — is not merely rhetorical but supported by tools, expertise, and monitoring mechanisms. However, like the FRA, EIGE's impact depends on political uptake. Its reports can be sidelined, and its recommendations ignored if there is no political will to act. Nonetheless, its existence marks a major institutionalisation of gender equality within the EU system, signalling that gender is not a marginal concern but a policy field with its own dedicated agency.

### ***Equinet and the Network of National Equality Bodies***

While FRA and EIGE operate at the supranational level, the EU equality regime also rests on institutions embedded within member states. Beginning with the 2000 directives, EU law has required every member state to establish or designate an equality body. These bodies are tasked with providing independent assistance to victims of discrimination, conducting research, raising awareness, and promoting equal treatment.

The institutional design of these bodies varies widely. Some countries created entirely new agencies; others assigned the mandate to existing institutions such as ombudsman offices or human rights commissions. The result is a patchwork of bodies with very different levels of independence, resources, and authority. In some states, equality bodies are well-funded, proactive, and influential in shaping public debate. In others, they are under-resourced, politically constrained, or treated as symbolic rather than substantive institutions.

To strengthen their collective capacity, the EU supported the creation of the European Network of Equality Bodies (Equinet), which now brings together 46 organisations from 34 European countries. Equinet provides a platform for exchange of best practices, training, and coordinated advocacy at the EU level. It also serves as a collective voice for equality bodies in Brussels, ensuring that their perspectives inform the development of EU law and policy. Through Equinet, local institutions that might otherwise be isolated gain access to transnational resources and networks.

However, limitations persist. EU law requires equality bodies only for race, ethnic origin, and gender, leaving it to member states whether to extend their competence to other grounds such as disability, religion, or sexual orientation. This creates uneven protection and fragmented mandates. Moreover, the EU has not set specific guidelines on how these bodies should operate, leaving significant discretion to member states. As a result, the effectiveness of equality bodies is highly uneven, raising questions about the consistency of rights protection across the Union.

### ***Why Institutionalisation Matters***

The creation of FRA, EIGE, and national equality bodies represents an important stage in the EU's equality project. It acknowledges that laws alone are insufficient: rights must be supported by institutions that monitor compliance, generate knowledge, and assist individuals. It also reflects the EU's commitment to embedding equality into governance structures, making it not only a legal principle but also an administrative reality. Yet the limitations of these institutions also highlight the fragility of the EU's equality regime. Without enforcement powers, agencies like FRA and EIGE depend on political will. Without strong independence and resources, national equality bodies risk becoming ineffective. And without consistent mandates, the patchwork of institutions can reproduce hierarchies among different grounds of discrimination.

For students of EU politics, this institutional layer is essential to understanding how equality is practised in the Union. It demonstrates the difference between law on the books and law in action, between high-level treaty commitments and everyday implementation. It also illustrates a broader point: the EU's equality regime is not only about what the treaties say but also about what institutions do, how they are resourced, and how they interact with civil society and citizens.



## VIDEO RESOURCES



Timeline: Women's Rights in the EU – European Parliament short video tracing the evolution of equality rights, from early legal bases to directives and today's challenges. Great for contextualising Article 119 → Defrenne → directives.

EIGE: An Essential Guide to Gender Mainstreaming – Explains what gender mainstreaming means in practice, with concrete examples of how EU policies integrate gender considerations. Useful for the Amsterdam Treaty → mainstreaming section.

Introducing the European Institute for Gender Equality (EIGE) – Short introduction to EIGE's role, mandate, and its Gender Equality Index.

Fits perfectly with Institutionalisation of Equality (FRA, EIGE, Equinet).

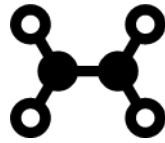
You, Me, Us – One Team (EIGE campaign video) – Engaging, student-friendly clip showing collective responsibility for gender equality in Europe. Good for an energiser or conclusion to institutionalisation section.

Gender Equality Forum 2022 (Opening Panel) – Panel recording on gender equality progress, evidence-based policymaking, and institutional challenges. Good for connecting historical material to contemporary debates on equality in times of crisis.

## STUDY QUESTIONS

1. The original treaties were largely silent on human rights and equality. How did this absence of explicit provisions shape the role of the European Court of Justice, and what does this reveal about the relationship between law and politics in the EU?
2. In cases like Defrenne v. Sabena, the ECJ transformed Article 119 from an economic safeguard into a rights-based instrument. To what extent can this be seen as judicial activism, and how does it compare with similar developments in national constitutional courts?
3. The institutionalisation of equality through bodies like FRA, EIGE, and national equality bodies was intended to turn legal rights into lived realities. Do these institutions succeed in bridging the gap between law “on the books” and law “in action”? Why or why not?
4. The EU often presents itself as a normative power promoting equality and human rights. Given the economic origins of its equality framework and the limitations of its institutions, is this self-image convincing? What evidence supports or challenges it?





## GENDER MAINSTREAMING IN THE EU'S TRADE AND DEVELOPMENT AID

The European Union frequently presents itself as a global leader in the promotion of gender equality. Through its treaties, external policies, and repeated commitments to the Sustainable Development Goals (SDGs), the Union claims to champion women's rights and to mainstream gender across all areas of action. Nowhere is this ambition more visible than in the domains of trade policy and development cooperation, two central pillars of the EU's external identity as a "normative power." Trade agreements and aid programmes are not only mechanisms of economic governance; they are also discursive and political sites where the Union projects its values beyond its borders. Gender equality has, at least rhetorically, become a defining feature of these policies.

Yet the translation of these commitments into practice has been uneven and often contradictory. While the EU increasingly speaks the language of gender mainstreaming, its approach to women's empowerment frequently reflects an instrumentalist logic. Women are positioned primarily as contributors to economic growth, whether as workers, entrepreneurs, or beneficiaries of aid schemes, rather than as rights-bearing subjects whose own perspectives and knowledges shape development and trade agendas. The result has been the reproduction of older paradigms such as "women in development" and the persistence of Eurocentric framings of empowerment that privilege liberal market participation over structural transformation.

### Guiding Questions

How does the EU frame its global role as a promoter of gender equality in trade and development?

What does it mean to say that the EU's approach is "instrumentalist"?

In what ways do EU trade and development policies reproduce epistemic hierarchies?

How do bureaucratic and institutional dynamics inside the EU shape the implementation of gender mainstreaming?

Where do we see the tension between rhetoric and reality in the EU's global gender equality agenda?

At the same time, civil society actors, feminist scholars, and NGOs have highlighted the silences that underpin EU trade and development policies. Local feminist organisations and grassroots women's movements in the Global South are often marginalised in the design of country strategies, impact assessments, and trade agreements. Their voices are acknowledged rhetorically but rarely incorporated substantively, resulting in programmes that may promote education and labour market participation but leave untouched structural barriers such as unpaid care work, precarious informal employment, or the gendered consequences of trade liberalisation.

This chapter examines the gender mainstreaming of the EU's trade agreements and development aid, situating it within broader debates on feminist political economy, postcolonial critiques, and epistemic justice. It asks to what extent the Union's external action advances gender equality in practice and to what



**Guiding  
Questions**

degree it reproduces hierarchies under the guise of empowerment, neutrality, or universality. By unpacking both the policy frameworks and their critical limitations, the chapter aims to shed light on the gap between EU rhetoric and reality, and on the ways in which gender equality is mobilised within external action as both a normative claim and a contested practice.

## THE INSTRUMENTALIST FRAMING OF GENDER IN EU TRADE AND DEVELOPMENT AID

Despite its strong rhetorical commitments, the European Union's approach to gender in trade and development cooperation has often been instrumentalist. Rather than treating gender equality as a transformative end in itself, the Union has tended to frame women's empowerment as a means to achieve other objectives — notably economic growth, productivity, and stability. This logic echoes the long-standing neoliberal development paradigm, where women are positioned as untapped resources whose integration into markets can yield developmental dividends.

In the field of development aid, this has translated into a sustained emphasis on women's education and labour market participation. EU programmes frequently highlight the potential of women to boost national GDPs, assuming that increases in school enrollment or access to microfinance will automatically generate wider empowerment. While such initiatives have delivered measurable improvements in access to education or credit, they often sidestep the structural inequalities that constrain women's choices and opportunities. For instance, the persistent burden of unpaid care work — acknowledged in EU reports but rarely addressed in programming — continues to limit women's capacity to benefit fully from labour market participation.

This approach reproduces the older paradigm of “women in development” (WID), which focuses on integrating women into existing economic structures rather than questioning the gendered nature of those structures themselves. Critics have labelled this an integrationist approach: women are asked to adapt to neoliberal development frameworks, but the frameworks are not adapted to account for women's lived realities. As a result, empowerment is narrowly defined in terms of income generation, entrepreneurship, and participation in formal markets, while broader dimensions of autonomy, representation, and social justice remain marginalised.

Moreover, local feminist organisations and civil society actors have frequently been excluded from meaningful participation in the drafting of country reports and development aid programmes. Although EU documents often cite the importance of inclusivity and consultation, in practice the perspectives of grassroots women's movements in the Global South are overlooked in favour of technocratic expertise and Brussels-based priorities. This silence is not incidental; it reflects the persistence of epistemic hierarchies in EU external action, where knowledge produced by local actors is devalued or treated as supplementary rather than authoritative.

The same instrumental logic permeates EU trade policy. While recent trade agreements have begun to incorporate gender-sensitive language, these clauses often remain symbolic or declaratory, folded into broader human rights and sustainable development chapters. Where gender is addressed directly, it tends to be linked to women's economic empowerment in narrowly defined ways: supporting women entrepreneurs, facilitating their participation in international trade, or integrating them into liberalised markets. Civil society organisations have noted that such framings ignore the realities of women working in informal agriculture or textile sectors, who are among the most affected by trade liberalisation. The structural vulnerabilities of these women — precarious labour conditions, lack of social protections, exposure to cheap imports — are rarely addressed in trade agreements that prioritise the interests of investors and large corporations.

Taken together, these patterns demonstrate that the EU's gender mainstreaming in trade and development aid has been less about dismantling structural inequalities and more about aligning women's roles with the Union's market-oriented agenda. Empowerment is celebrated when it contributes to growth

and competitiveness, but less so when it challenges neoliberal assumptions or requires redistributing resources and power.

The instrumentalist tendencies of the EU's gender approach become particularly visible when looking at concrete development aid programmes. One striking example is the EU's emphasis on girls' education as a cornerstone of its external gender strategy. Education is, of course, a vital right and a critical pathway to empowerment. Yet in EU policy documents, the rationale for promoting girls' schooling is often framed less in terms of justice or equality, and more in terms of economic returns. Girls are described as "smart investments" because their education is expected to generate productivity gains, healthier families, and faster economic growth. While these outcomes may be desirable, the framing risks reducing girls' lives to their instrumental value to development goals, rather than affirming their right to education as intrinsically valuable. Moreover, the focus on access to education often overshadows questions of curriculum content, social norms, and post-graduation opportunities — the very factors that determine whether education translates into meaningful empowerment.

Similarly, microcredit schemes targeting women have been promoted under EU development programmes as vehicles for women's economic empowerment. These initiatives typically aim to provide women with small loans to start businesses, thereby increasing household income and contributing to national development. Yet feminist critiques have shown that microcredit often places disproportionate responsibility on women without addressing broader structural inequalities such as lack of property rights, gender-based violence, or exclusion from formal financial systems. In some contexts, microcredit has even entrenched women's vulnerability by creating cycles of debt. EU programming has tended to emphasise the quantifiable success of increased loan uptake rather than examining the deeper question of whether such schemes alter gendered power relations in households and communities.

Another case is the EU's support for women's labour market participation through vocational training and employment programmes in aid-recipient countries. While these programmes often succeed in boosting short-term employment statistics, they rarely address the structural barriers of unpaid care work that continue to limit women's participation in formal markets. For example, EU-backed projects in sub-Saharan Africa and South Asia have offered training in technical skills, but without parallel investment in childcare infrastructure, social protection, or labour rights, women remain trapped in precarious or informal work. This reflects a broader pattern: empowerment is measured by women's presence in the labour market, not by the quality of that participation or by the redistribution of burdens that underpin gender inequality.

Finally, the EU's approach has often been criticised for excluding local feminist voices in programme design. In several African, Caribbean, and Pacific (ACP) countries, local women's organisations have reported that their knowledge of community needs and priorities was sidelined in favour of donor-driven templates. For example, Debusscher's research (2012, 2013) documents how EU development programming frequently silenced the perspectives of grassroots women's groups, privileging technocratic expertise instead. This exclusion not only undermines the legitimacy of EU interventions but also reproduces epistemic injustice by treating the lived experiences of women in the Global South as supplementary rather than central.

Taken together, these examples show that EU development aid often treats women as instruments of development outcomes rather than as rights-bearing agents whose empowerment must be defined on their own terms. This is not to dismiss the tangible benefits of EU-funded programmes, but to underline their limitations: by prioritising measurable economic gains over transformative social change, they risk reinforcing the very inequalities they claim to address.

The instrumentalist framing visible in EU development aid is not confined to external assistance programmes. It also extends into the EU's approach to trade agreements, where gender issues are increasingly referenced but often in ways that reproduce similar limitations. Just as in aid policy, women

are frequently positioned as contributors to broader economic or political objectives, rather than as rights-bearing actors whose empowerment should be pursued for its own sake. In this sense, EU trade agreements illustrate a broader tension in the Union's external action: the ambition to act as a global norm-setter on equality and human rights coexists with practices that remain narrowly economic, technocratic, or even paternalistic. Gender mainstreaming is present in trade policy, but it tends to operate within a framework of neoliberal globalisation, privileging the liberalisation of markets and the facilitation of international commerce over structural transformation of inequalities.

*If women are described as “smart investments” in EU policy documents, what does this reveal about the underlying logic of empowerment?*



*How might development policy look different if women were treated as rights-bearing subjects rather than as contributors to GDP?*

## NORMATIVE CONTEXT: HUMAN RIGHTS CLAUSES AND SUSTAINABLE DEVELOPMENT CHAPTERS

One of the most visible ways in which the EU has sought to demonstrate its commitment to values in external trade policy is through the normative embedding of human rights and sustainable development provisions in its trade agreements. Since the early 1990s, the EU has consistently inserted human rights clauses into its association and cooperation agreements, framing them as “essential elements” that underpin the entire contractual relationship. By the late 1990s and 2000s, these provisions expanded into sustainable development chapters, which linked human rights to labour standards, environmental protection, and, increasingly, non-discrimination.

At first glance, this framework appears highly progressive. It suggests that EU trade is never purely about markets, but is always conditioned on respect for fundamental rights. The inclusion of such clauses allows the EU to suspend agreements unilaterally in the event of serious human rights violations by a partner country. The EU has used this mechanism more than twenty times, diverting development aid away from governments in contexts such as military coups, fraudulent elections, or major deteriorations in political security. This has reinforced the EU's self-presentation as a “normative power” that insists on ethical standards in global commerce.

However, closer scrutiny reveals important limitations. First, while the clauses are formally universal, their enforcement has been highly selective. Suspension has rarely, if ever, been applied in cases of gender-based discrimination, violations of women's rights, or systemic gender inequality. Instead, implementation has concentrated almost exclusively on dramatic political crises. This reveals a hierarchy of norms: political stability and regime type are treated as decisive, while gender justice is sidelined. Even when widespread gender-based violence or exclusion persists, these issues are seldom deemed grounds for triggering conditionality.

Second, the design of the clauses themselves reflects a Eurocentric orientation. The EU defines what counts as “human rights violations” and “sustainable development,” often in ways that marginalise local interpretations. Gender equality, when mentioned, tends to be absorbed under the broad umbrella of “non-discrimination.” This formulation can obscure the specific structural barriers that women and



gender-diverse people face in trade and development contexts. The absence of targeted, enforceable language on gender equality means that such commitments often remain aspirational rather than operational.

Third, the mechanisms for accountability within these chapters are often weak. In theory, individuals and civil society actors can submit petitions to national contact points about violations of labour or environmental standards. Yet these petitions rarely lead to meaningful change. Feminist NGOs and trade unions have complained that the process is bureaucratic, opaque, and tilted in favour of business interests. Moreover, the scope of what can be petitioned is limited: while violations of environmental standards may be recognised, systemic gendered harms caused by trade liberalisation — such as job losses in women-dominated textile sectors or the erosion of social protections — often fall outside the remit of these mechanisms.

Fourth, the discursive framing of these clauses reinforces an assumption of EU superiority. By positioning itself as the guardian of universal norms, the EU effectively casts partner countries as the sites of potential violations, in need of correction or conditional discipline. This overlooks the fact that gender inequality and discrimination are hardly absent within the EU itself. For example, wage gaps, underrepresentation in decision-making, and gender-based violence remain persistent challenges in many member states. Yet the clauses are not designed to apply reciprocally. They function primarily as instruments of external projection, not as mechanisms of internal accountability.

Finally, there is the issue of symbolism versus substance. The inclusion of human rights and sustainable development chapters allows the EU to claim normative leadership on the global stage, but critics argue that these provisions often serve as window dressing. They demonstrate commitment in principle but are weak in practice. Bartels (2014) has suggested that one way to address this gap would be to allow actors such as the European Parliament or NGOs to request investigations into alleged violations of equality and non-discrimination rights. Yet to date, no such mechanism has been institutionalised.

When viewed through a feminist and epistemic justice lens, these shortcomings become even clearer. The voices of women's organisations and local feminist movements are largely absent from the design and monitoring of these chapters. Their concerns — about unpaid care work, informal labour, or the vulnerabilities created by trade liberalisation — are not easily translatable into the technocratic language of sustainability impact assessments or petition mechanisms. As a result, what gets counted as a "human rights violation" in EU trade policy often excludes the lived realities of those most affected.

In sum, the normative context of EU trade agreements demonstrates both ambition and contradiction. On the one hand, it reflects a genuine attempt to link trade to values, embedding human rights into the core of external economic relations. On the other hand, it exposes the limits of the EU's normative power: its selective enforcement, Eurocentric definitions, weak accountability mechanisms, and instrumental treatment of gender equality reveal how far rhetoric can diverge from practice. For feminist scholars and practitioners, this is not simply a matter of policy effectiveness but one of epistemic injustice: whose rights are prioritised, whose experiences are visible, and whose knowledge shapes the very meaning of sustainable development in trade policy.

## IMPACT ASSESMENTS AND SUSTAINABILITY IMPACT ASSESMENTS

Alongside the human rights clauses and sustainable development chapters, the European Union relies heavily on Impact Assessments (IAs) and Sustainability Impact Assessments (SIAs) to evaluate how its trade agreements affect partner countries. These assessments are designed to provide evidence-based analyses of the likely economic, social, and environmental consequences of trade liberalisation. In theory,

they are meant to ensure that trade agreements not only expand market access but also promote inclusive and sustainable development.

At first sight, this reliance on systematic assessments signals a commendable commitment to transparency and accountability. It suggests that the EU does not treat trade as a purely economic domain but recognises its wider implications for societies. The European Commission often describes SIAs as participatory exercises that take into account the perspectives of multiple stakeholders, including civil society, labour unions, and NGOs. Yet in practice, the integration of gender considerations into these assessments has been highly inconsistent and often superficial. Some reports devote only a few sentences to gender equality, treating it as a marginal side issue rather than a central dimension of trade impacts. Only a handful of SIAs — such as those linked to the modernisation of the EU–Chile Association Agreement or the EU–Japan Free Trade Agreement — have attempted more detailed gender analyses. Even in these cases, the treatment of gender tends to remain descriptive and limited to identifying “potentially affected groups,” without exploring the deeper structural dynamics of how trade regimes interact with gendered divisions of labour.

The methodological orientation of these assessments compounds the problem. Most IAs and SIAs rely primarily on quantitative economic models that project the effects of tariff reductions, changes in trade flows, and GDP growth. While these models can produce neat numbers and cost–benefit scenarios, they are poorly equipped to capture the complex and intersectional ways in which trade liberalisation affects women and men differently. For example, a model might estimate aggregate employment gains, but it will not show how women concentrated in informal agriculture or textiles lose out when cheap imports flood the market. Nor will it account for how cuts to tariff revenues lead governments to reduce public spending — often on services such as health and education that disproportionately benefit women.

Feminist organisations and civil society groups have long pointed out this mismatch between EU impact assessments and lived realities. Reports by WIDE+ (2017), CONCORD (2018), and ActionAid (2018) stress that trade liberalisation can exacerbate inequalities, particularly in sectors dominated by women. In many developing countries, textiles and agriculture employ large numbers of women workers, who face job losses, wage suppression, and deteriorating labour conditions when EU free trade agreements trigger an influx of cheaper foreign products. At the same time, the shift towards export-oriented production often increases women’s workload without improving their bargaining power or access to social protection. These adverse impacts rarely figure prominently in EU assessments, which prioritise aggregate growth indicators over distributional effects.

Another recurring critique is that the consultation processes in SIAs tend to privilege voices already aligned with neoliberal policy frameworks. Consultations may include business associations, chambers of commerce, and established NGOs in Europe, but they often fail to engage meaningfully with grassroots women’s movements in the Global South. Even when consultations do occur, the input of feminist actors is seldom reflected in the final reports. This points to a form of epistemic injustice: local women’s knowledges about how trade reshapes their livelihoods are systematically devalued in favour of technocratic expertise and macroeconomic modelling.

Moreover, the institutional design of SIAs reinforces a narrow conception of empowerment. When gender is addressed, it is frequently framed in terms of supporting women entrepreneurs or enhancing women’s participation in formal markets. This mirrors the logic seen in development aid: empowerment is equated with market integration, while structural barriers such as unpaid care work, precarious informal employment, or weak labour rights are largely ignored. By privileging this narrow vision, SIAs reproduce the neoliberal assumption that women’s equality can be achieved through their insertion into liberalised

markets, without questioning how those markets themselves are structured by gendered and racialised inequalities.

Taken together, these shortcomings mean that SIAs often serve less as tools for feminist accountability than as instruments for legitimising predetermined trade agendas. They provide the appearance of comprehensive analysis but sidestep the very issues feminist scholars and NGOs identify as most urgent. This disconnect between what is measured and what matters is not accidental: it reflects deeper epistemic hierarchies within EU trade governance. Quantifiable indicators are treated as authoritative knowledge, while the qualitative experiences of women in vulnerable sectors are relegated to the margins.

For critics, the result is a system where gender equality is mentioned but rarely operationalised, acknowledged but rarely acted upon. The EU can point to the inclusion of gender language in its assessments, yet the actual design and implementation of trade policy continues to prioritise liberalisation and competitiveness over redistribution and justice. From a feminist perspective, this is a clear instance of epistemic injustice: women's lived experiences of global trade are made invisible, while technocratic knowledge rooted in neoliberal economics is elevated as objective and neutral.

*What forms of knowledge are privileged in SIAs? Whose experiences are made visible, and whose are marginalised?*

*Can you think of examples where quantitative indicators may hide gendered or intersectional inequalities?*



## THE NARROW FRAMING OF WOMEN'S EMPOWERMENT IN EU TRADE POLICY

When the European Union highlights gender equality in its trade agreements, it most often does so under the banner of “women's empowerment.” At first sight, this might appear progressive: women are named as actors in international trade and their participation is explicitly encouraged. Yet the content of this empowerment discourse reveals significant limitations.

In practice, empowerment is frequently understood in narrow, market-based terms. Trade agreements emphasise support for women entrepreneurs, assistance to small and medium-sized enterprises (SMEs) owned by women, and programmes to help women integrate into liberalised international trade. These measures tend to focus on a small and relatively privileged group of women — those with access to capital, education, and global networks — while the vast majority of women engaged in trade-related sectors remain outside their scope.

Civil society organisations such as WIDE+, CONCORD, and ActionAid have repeatedly criticised this focus. They argue that the EU's trade policies largely ignore women working in informal sectors, especially agriculture, textiles, and care-related industries. In many partner countries, these sectors employ predominantly female labour under precarious conditions. Trade liberalisation often exposes them to intensified competition, job losses, and falling wages as cheaper imports enter domestic markets. For example, textile workers in countries signing EU trade deals have seen factories close due to competition from Asian imports, while small-scale women farmers have struggled to compete with heavily subsidised EU agricultural exports. Yet such impacts are rarely addressed in empowerment programmes that privilege entrepreneurship over subsistence or wage labour.

Moreover, the EU's framing of empowerment often assumes that integration into markets is inherently beneficial. By presenting liberalised trade as an opportunity for women, EU discourse obscures the power asymmetries and exploitative dynamics that structure global markets. Feminist political economists argue that this represents a continuation of the "Women in Development" paradigm: women are incorporated into existing economic systems, but those systems themselves are not transformed. The result is an integrationist approach, where women are encouraged to adapt to neoliberal trade regimes rather than challenging the structures that marginalise them.

This narrow framing also sidelines questions of redistribution. Empowerment is measured in terms of participation — how many women are entrepreneurs, exporters, or professionals — rather than in terms of whether structural inequalities are being reduced. Issues such as unpaid care work, access to social protections, and labour rights are often acknowledged in EU documents but remain absent from trade agreements themselves. As long as these barriers persist, women's ability to benefit from trade liberalisation will remain uneven and limited.

Finally, there is a discursive dimension to this empowerment agenda. By focusing on women's potential to contribute to economic growth, EU trade policy reproduces an instrumentalist logic similar to that seen in development aid. Women are valued for their contributions to competitiveness and GDP, not for their rights, autonomy, or knowledge. This discursive framing reflects a broader epistemic hierarchy: the voices of grassroots women's organisations, trade unions, and feminist movements in the Global South are marginalised, while EU institutions and economic experts define what empowerment means and how it should be pursued.

In short, the EU's empowerment discourse risks reproducing the very inequalities it seeks to address. It privileges certain women while neglecting others, celebrates market integration while ignoring structural barriers, and measures success in ways that are detached from the lived realities of women in vulnerable sectors.

## CROSS-CUTTING ISSUES: BUREAUCRATIC AND INSTITUTIONAL PROBLEMS

When analysing the EU's record on gender equality in trade and development aid, we cannot simply stop at the policy documents or the rhetorical commitments. To really understand why gender mainstreaming so often falls short, we have to look inward: into the bureaucratic structures, the institutional routines, and the deeper gendered mentalities that shape how the EU actually functions.

A recurring theme in the literature is the **EU's low organisational capacity** to deal with gender in a systematic way. Ioannides (2017) has shown that staff, including designated Gender Focal Points (or GFPs), often failed to give gender the attention it required. And crucially, this wasn't only a question of willpower: they frequently lacked the technical expertise, the resources, and the mandate to act. Even when technical guidelines existed, they were fragmented, poorly tailored to staff needs, and not well used. Delegations rarely developed the analytical tools necessary to situate gender within country strategies or programme dialogues. What this means in practice is that gender mainstreaming was treated as an **add-on**, something nice to have if time allowed, but rarely considered essential to core operations. The result is a structural weakness: even where political will exists at the highest level, the system itself is poorly equipped to translate that will into practice.

Now, let's look more closely at who is actually responsible for gender on the ground. Debusscher's work (2013, 2014) makes this very clear: in many EU delegations, gender mainstreaming was assigned almost entirely to **Gender Focal Points**. But these posts were not senior officials with strong decision-making power. Quite the opposite: they were usually female contract agents, on temporary contracts, located in

non-decision-making positions, and juggling multiple other responsibilities. Gender work was not their only task — it was piled on top of other duties.

Think about what this signals: a supposedly horizontal principle, one that all staff should apply, becomes the job of a handful of precarious women on the lowest rungs of the hierarchy. And even when the EU invested in training these staff, many of them left soon after because of their short-term contracts. This is what we might call a leaky pipeline of gender expertise: whatever capacity is built drains away almost immediately. So, structurally, gender is marginalised twice over: first, by being delegated to low-status staff, and second, by that staff being positioned in insecure and peripheral roles.

But beyond the issue of staff and resources, there's also the deeper question of **institutional mentality**. Within DG Trade, for example, gender is often seen as irrelevant to the “real business” of trade. WIDE+ and the Trade and Gender Working Group (2017) report that gender issues are regularly described as “exogenous to trade policy”. This isn't just a casual oversight; it's embedded in what social scientists call an epistemic community. Trade professionals inside the Commission have clustered around a set of shared beliefs: that trade is neutral, that trade liberalisation benefits everyone, and that it is therefore unnecessary to ask who wins and who loses along gendered lines (Viilup 2015).

These beliefs are not neutral themselves. They are actively reinforced by the Commission's technocratic culture — the obsession with “better regulation,” reducing administrative burden, and relying on quantitative measures (Minto & Mergaert 2018). Feminist critiques, which stress power relations, social reproduction, and qualitative experiences, sit very uneasily within this technocratic frame. They are treated as anecdotal, unscientific, or politically inconvenient. In other words: gender is not just invisible; it is actively excluded by the epistemic norms that define what counts as valid knowledge in trade policy.

It would be misleading, however, to say that nothing has changed. On the positive side, both the Commission and the EEAS are now subject to monitoring against six specific objectives: coherence, coordination, leadership, resources, robust gender evidence, results, and partnerships. These are important steps. They reflect an acknowledgement that progress requires institutional accountability, not just good intentions. There has also been a stronger push to integrate gender into core staff training, not just optional modules. GFPs have received more formal recognition, and delegations are under greater pressure to prioritise gender. These efforts point to a gradual thickening of institutional routines around gender — an attempt to move from ad-hoc initiatives toward embedded practice.

But even here, the structural barriers remain. Monitoring frameworks can only go so far if the cultural mindset remains one where gender is seen as marginal. Training sessions can raise awareness, but they cannot in themselves overturn entrenched hierarchies or shift epistemic communities.

Let's also talk about **how the EU measures progress**. Under the 2016–2020 Gender Action Plan (GAP II), the EU adopted the OECD's DAC gender marker system. This marks projects as G2 (gender is the principal objective), G1 (gender is a significant objective), or G0 (not targeted). The ambition was bold: by 2020, the EU wanted 85% of all new programmes to be coded as G1 or G2. This was, in many ways, a breakthrough moment — finally setting a quantifiable benchmark. But by 2020, the EU had not achieved this target. The fact that such an ambitious goal could not be reached demonstrates again the gap between political aspiration and bureaucratic practice. Targets without cultural and institutional transformation remain symbolic rather than transformative.

Another structural challenge comes from the **EU's multi-level governance**. In areas where the EU has strong competence, like anti-discrimination law or single market rules, feminist actors and NGOs have been able to exert influence and shape outcomes. But in areas like social and welfare policy — crucial



arenas for addressing structural gender inequalities — competence largely lies with member states. This produces a paradox. The EU can be strong on gender in the single market but weak in the very policies that matter most for gender justice. And because external action is closely tied to internal norms, this lack of internal clarity undermines external credibility. Often, EU officials end up arguing that gender issues should be tackled either through human rights dialogues with third countries or left to member states to handle individually. The result is fragmentation, inconsistency, and diffusion of responsibility.