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LETTER FROM OUR MANAGING EDITOR

Oxford, August 2020

Dear Reader,

Welcome to the August 2020 issue of the St Antony's International Review (STAIR). Recent paradigm shifts in the field of International Relations (IR), witnessed through phenomena such as the emerging #MeToo movement, underscore the undeniable need for IR scholarship to reexamine and recentre discussions of gender in the field. This 16.1 STAIR edition intends to act upon this urgency by featuring six articles that assess how notions of gender remain inextricably intertwined with international affairs in several arenas.

These articles skilfully unpack challenges to traditionally masculine power dynamics vis-à-vis popular culture, assess the critical nature of intersectionality in understanding marginalised and colonised populations, and the development – and hindrance – of gender in forming state capacity and national identity, among other approaches. Two insightful interviews – one with Professor Mona Lena Krook of Rutgers University and another with Aušrinė Armonaitė, a Lithuanian Member of Parliament from the liberal Freedom Party – anchor these discussions with the implications of discussing gender for scholars and practitioners alike. Finally, we round out this section with four book reviews addressing issues of gender across North-South divides, the effects of #MeToo on the politics of social change, and the growing relevance of gender identities and sexualities to IR.

This issue also features a Guest Section on an emerging disciplinary debate within the field of global IR: does IR need Area Studies? Five pieces from professors within the Oxford community showcase different realms of this discussion, assessing how the mutually impactful relationship between the two fields recentres existing conversations across Europe, China, the Middle East, and South Asia. An interview with Professor Amitav Acharya, the former president of the International Studies Association, rounds out this section by summarising the key points of this debate, assessing the COVID-19 pandemic's potential effects on global IR, and providing career-shaping tips to younger IR scholars.

I am also proud to highlight STAIR's fifteenth anniversary in this edition. Our General Section Editors have metaphorically dusted off the (digital) archives to review articles featured in STAIR over the last fifteen years, looking back to prior coverage in this journal from topics as varied as cybersecurity, knowledge production, international cooperation, and the rise of China. As we mark fifteen years of STAIR's contribution to IR, we take seriously our commitment to diverse scholarship, not merely as a throwaway platitude, but as a carefully implemented reality: this issue features twenty-six voices with backgrounds ranging from graduate students to practitioners in the field and ten-

ured faculty. We are grateful for their continuous efforts in expanding the realm of knowledge and complicating our understandings of IR beyond its normatively accepted boundaries.

The COVID-19 pandemic has undoubtedly affected all of us, and I would like to express my appreciation to the dozens of individuals who contributed to the production of this issue despite the pandemic's enormous effect on our production process. In particular, I offer my utmost gratitude to the entire STAIR Editorial Board for their endless work over the last nine months in preparing this issue for our readers and subscribers. I am also appreciative to all the members of the STAIR Advisory Board, St Antony's College, the Centre for International Studies, and the entire Department of Politics and International Relations at the University of Oxford for supporting STAIR.

I sincerely hope you enjoy this issue.

Warm regards,

Daniel Waqar
Managing Editor

THEME SECTION

ENGENDERING CHANGE: EXPLORING THE DYNAMICS OF GENDER

Editorial Introduction

Alexandra Diouk, Anita Pant, and Reja Wyss

If ‘the personal is political’ was the rallying cry of second-wave feminists in the 1960s, it was Cynthia Enloe in her 1990 book *Bananas, Beaches and Bases*¹ who took this further to declare that ‘the personal is international’ — and, indeed, ‘the international is personal’. Thirty years on, it is worth recalling this as we begin this exploration of the dynamics of gender in the international arena. Nowadays, it is relatively commonplace to find studies discussing, for example, the role that gender plays in peacekeeping, the interaction between gender and nationalism, or the way in which gender influences development strategies. Yet the value of such studies lies not just in their macro-level abstractions or relevance to high politics, but also in their acknowledgment of the everyday ramifications of these gendered phenomena. Sheila Meintjes et al, for instance, have argued that the patriarchal assumptions of peacekeeping have perpetuated post-conflict forms of violence against women,² while Alexandra Novitskaya has made a link between Vladimir Putin’s hypermasculine nationalism and the persecution of non-heterosexual minorities in Russia.³

To take a more recent example, Caroline Criado-Perez’s 2019 book *Invisible Women: Exposing Data Bias in a World Designed for Men* wrestles with what has been termed the ‘gender data gap’.⁴ Because we have significantly less data on women than men, she argues, everything from city planning to public transportation to archaeological digs have been unwittingly disrupted on a global scale for generations. Yet, far-reaching as the effects of these data gaps may be, and though such effects could be confined to impersonal economic and policy making questions, Criado-Perez never allows us to forget the fundamentally personal implications of this data gap on people’s day-to-day lives. Enloe’s declaration that ‘the personal is international’ allowed for a far-reaching expansion of the feminist ideals of the 1960s and created a framework which has continued relevance in contemporary gender studies. Criado-Perez demonstrates the utility of such a framework, but also shows how much progress is still to be made. Once we acknowledge that gendered dynamics play out on both the global and local level, the issues which we are compelled to tackle continue to expand and diversify. Yet, while global events of recent years have seen the question of gender extended into the mainstream, feminism remains a relatively marginal

tradition within the field of International Relations, and indeed many other 'traditional' disciplines. Through showcasing the scholars present within our Theme Section, we hope to challenge this and highlight the importance of studying gender in international affairs.

Diversifying the way scholars conceive of gender issues on the global stage will allow for a more nuanced understanding of the issues that the 'gender' factor calls up in international affairs. A common misconception holds that gender studies and academic feminism focus exclusively on women. However, at the core of gender studies is an interrogation of the nature of power, including questions of how sociocultural ideas about gender are defined by relationships of power and how gender interacts with other hierarchies of power including race and class. Thus, in choosing to focus on the *dynamics* of gender for this theme section, we hoped to encourage our contributors to go beyond essentialist notions of gender. At a time when feminist movements can start with a simple hashtag, it is more important than ever to understand the complex power dynamics of gender, if the #MeToo and #TimesUp movements are to be lasting forces for change rather than fleeting social media moments. Such an approach lends itself well to STAIR's international and interdisciplinary purview, and presents wide-ranging research opportunities to scholars in the realm of international affairs. The diversity of topics covered in this theme section certainly attests to the powerful value of a gender perspective in deepening our understanding of key global issues.

When we proposed this theme section to the STAIR Editorial Board, it seemed to be an opportune moment to discuss the topic of gender in the international arena. The populist wave sweeping across the world had gone hand in hand with the resurgence of 'hypermasculine' politics, embodied by the likes of Donald Trump and Jair Bolsonaro. At the same time, global movements such as #MeToo had allowed for shared experiences and awareness of sexual assault and harassment to transcend national borders. Yet, if gender seemed to be a hot-button issue in October 2019, it has become even more so as we write this introduction in July 2020. The COVID-19 pandemic has exposed, for example, just how critical a factor gender is in our political leadership. It has shown not only the concrete dangers brought about by strongman politics through the US and Brazil's failed virus containment policies, but also the value of alternative leadership styles, such as that of Jacinda Ardern in New Zealand. On a more personal level, as lockdowns have forced many of us to reconfigure our lives within the four walls of our homes, the boundary between the public and the private has become ever more blurred, with important implications for how we think about gender roles. The UN has recently reported a significant increase in calls worldwide to domestic crisis hotlines, offering a fresh reminder that the personal and political, and local and global, cannot be separated when examining questions of

gender.⁵ While we could have never predicted that this issue would be published amid a global pandemic, if anything, the crisis has only served to underline the enduring politics of gender in the international arena.

The Dynamics of Gender in Politics: Our Interviews

We begin by focusing on what might be termed the ‘gender politics of politics’ in two interviews. When discussing ideas for this feature, we were keen to explore the gender dynamics of both politics as practice and political science as an academic discipline. In order to do so, we invited two individuals with contrasting perspectives to discuss this subject with us: one, a policymaker and the other, an academic. Together, these interviews juxtapose the concepts of gender and politics as experienced from an academic and an empirical standpoint. To take only one example: During our discussion with Professor Krook, there arose a moment in which she mentioned a study undertaken by Swedish academic Sandra Håkansson which focused on harassment of female politicians. In our interview with Lithuanian MP Aušrinė Armonaitė, we followed up on this point in order to learn about her personal experiences with this concept. This was a critical moment for us as interviewers, and we began to make connections between Professor Krook’s research and MP Aušrinė Armonaitė’s experiences as a politician which continued to link the two conversations throughout.

The first interview with Professor Mona Lena Krook of Rutgers University addresses both the progress and setbacks regarding women’s involvement in politics since the seminal Beijing Declaration and Platform for Action in 1995. Drawing on her extensive research on female politicians, Professor Krook offers her perspective on the success of gender quotas, while also highlighting the continuing barriers to women’s full political participation, not least in the growing violence perpetrated against female politicians around the world. While violence in politics has long been recognised as a problem for democracy, this interview discusses why violence against women in politics should be acknowledged as a distinct, albeit interrelated, phenomenon in contemporary politics. With the COVID-19 pandemic forming the backdrop for this interview, Professor Krook also reflects on the gender dimensions of this global crisis and the potential for a positive shift in attitudes towards female political leadership resulting from it.

The second interview invites Lithuanian Member of Parliament Aušrinė Armonaitė to reflect on her personal experience as a young, female politician in Lithuania. Armonaitė gives an insight into her journey into politics, while setting out her vision for a progressive political programme which harnesses the power of new technologies and places an emphasis on protecting and furthering human rights. This interview calls attention to the ongoing challenges faced by female politicians,

particularly in relation to the 'everyday sexism' that persists in many spheres of public life, including national and international politics. It also highlights the ongoing debate over the substance of 'feminist' politics, addressing key debates such as whether gender quotas are feminist or rather a barrier to a truly meritocratic system, as well as if an explicitly feminist politics is only salient in certain cultural contexts. Such debates make clear the limits of a truly 'global' vision of feminist politics and underline the importance of cultural and historical factors, as well as individual outlooks, in shaping the dynamics of gender in politics and beyond.

The Interdisciplinary and Global Dimensions of Gender

While International Relations may be the traditional lens through which to study international affairs, since the 1990s, feminist scholars have highlighted the inherently gendered nature of mainstream (or 'malestream') IR theory. Indeed, in its exclusionary focus on 'high' politics, traditional IR can be seen to have largely overlooked the contributions of women and the impact global politics has on them, while justifying this exclusion in terms of a fictive 'gender neutrality' that wilfully ignores the male-dominated history of the discipline, and indeed the practice of international politics. As Gillian Youngs has argued, although it is a field of study about power, 'IR is more a discourse of and about the powerful than one that seeks to examine deeply how power works, including its gendered, racialised and socio-economic dimensions, or to situate individuals and groups differently in terms of capacity, control, influence and freedom'.⁶ For this reason, feminist IR scholars have played an important role in redefining the boundaries of the discipline to include a broader range of actors and actions, offering a corrective to the gendered distortions in the study of global politics.

Building on this, the articles in this section push the boundaries of a traditional understanding of 'international affairs' through exploring the dynamics of gender in a range of contexts and interrogating how social constructions of gender permeate institutional structures and practices. Written by contributors of various academic backgrounds, they span a wide range of topics, from microfinance to education policies, reproductive rights to military conflict, and even popular culture. While admittedly an eclectic mix, our hope is that the diversity of contributions serves to reflect the ubiquitous yet variegated influence of gender in the international arena.

The first two articles critique the rise of 'women-focused' development, particularly in relation to microfinance initiatives in the Global South. While initially formulated as a gender-neutral development model, microfinance has increasingly foregrounded female borrowers, giving rise to its promotion as an engine for female empowerment in

impoverished communities. However, as both articles highlight, granting women access to capital alone does not necessarily ensure their economic independence, nor is this a shortcut to their meaningful empowerment in other spheres. In ‘The Exploitative Use of Women in Contemporary Liberal Development Agendas’, Rebecca Earl explores how women in the Global South have been instrumentalised as agents of economic development through the promotion of microfinance initiatives and female entrepreneurialism. This article highlights the prominence of institutional interests in the greater inclusion of women in microfinance, thereby questioning the extent to which such initiatives can really challenge the entrenched patriarchal structures underlying women’s economic and social marginalisation.

In ‘Women’s Collectives as Vehicles for Empowerment’, Monika Nielsen and Lopamudra Tripathy offer an insight into the gender dynamics of development on the ground through a case study of Women’s Self-Help Groups (WSHGs) in the east Indian state of Odisha. WSHGs—small groups of women who collectively share the responsibility of a loan—have been foregrounded in development programmes owing to their value in improving both the economic and social efficiency of microfinance. While acknowledging the success of women’s collectives in leading improvements in community education and health in Odisha, this article questions their ability to meaningfully empower women at the individual level. Crucially, it scrutinises the concept of ‘female empowerment’ in itself, highlighting the importance of women’s own perceptions of their empowerment and the inter-relatedness of issues affecting their lives.

The third article shifts the focus to Kenya, as Laurence LeBlanc explores the gender dimensions of socio-political change in ‘The Gendered Educational Apparatus in Kenya: Implications of a Rise in Neoliberal Education and Feminised Labour Responsibilities’. As in the case of microfinance, the formalised education of women has often been romanticised as a simple solution to tackling gender inequalities and a means of female empowerment in rural communities. However, as LeBlanc shows, education is not necessarily a ‘gender neutral’ sphere, especially when undergirded by a neoliberal market logic by which feminised labour is inherently devalued. Drawing on ethnographic research conducted in various pastoral communities in Kenya, this article questions the impact of rising rates of formalised education on gendered labour expectations, thereby illuminating the porous boundaries that exist between the private and the public spheres in Kenya and beyond.

In our fourth article, ‘US Colonialism in Puerto Rico: Why Intersectionality Must Be Addressed in Reproductive Rights’, Malia Lee Womack explores the abuses suffered by Puerto Rican women at the hands of various individuals and entities from the United States including private industries, government agencies, and researchers. The

article focuses on the tragedy of sterilisation and birth control trials which Puerto Rican women were forced and coerced to undergo. The article spans from early to the mid-twentieth century and concludes by addressing the second-wave feminist movement. Though this movement emerged Stateside in the 1960s, Puerto Rican women galvanised it to draw attention to the injustices they were suffering on the Island and to argue for substantive reproductive rights in order to safeguard Puerto Rican women against further injustices at the hands of the United States.

Next, 'Gender Is What States Make of It: Gender, Nation-Building and War in Israel' Katharine Brooks explores questions of how gender intersects with involvement in international conflict. The paper seeks to further examine the causal link between gender inequality and conflict by analysing the case study of Israel. The paper considers a number of interviews with current and former female IDF personnel, as well as drawing from extensive secondary material. The paper considers why it is that Israel is an outlier in the relationship between gender inequality and conflict in that it has demonstrably higher levels of violent conflict than other states which have comparable levels of gender equality. The author believes that Israel is a unique case and seeks to shed light on this through tracing the process of gender construction within Israel alongside the process of militarisation and securitisation. Brooks contends that gender was constructed in Israel to fortify the security of the nation both from domestic and international threats. Women were, for example, galvanized as security guarantors both through the concept of "soldier-citizens" and a pro-natalist rhetoric which sought to portray Israeli women as "mothers of the nation."

In 'The Queen in the North: Conceptualising International Relations, Popular Culture, Gender, and How Feminine Power Won the Game of Thrones', Amanda DiGioia shines a light on the masculinised world of politics and international relations, both in the fictional and non-fictional world. Building on the work of William Clapton and Laura Shepherd,⁷ she argues that feminine-coded power, such as Sansa Stark's letter-writing, her collaborations, patience and strategy, emerges as the winner in the popular TV series and draws parallels with the politics of Sanna Marin and Jacinda Ardern. She then takes the debate further by including discussions of corporal styling, sexual violence, and race and shows how they change the interpretation of legitimate power in *Game of Thrones* and simultaneously expose the challenges/work that we, as a global society, still have ahead of us. In so doing, her work connects to questions of substantive versus descriptive representation, how popular culture can shape 'real world' expectations and the importance of intersectionality.

Concluding Thoughts

Editing this Theme Section has been an opportunity not only to engage others in discussions about the importance and implications of today's gender realities, but indeed for us to learn about these issues ourselves. Through reading the fantastic articles submitted, choosing the works included in the Book Review section, and undertaking two eye-opening interviews, we have been privileged to expand our own conceptions of gender in an international context. And though we chose the Theme Section title with one idea in mind, we now hold a different and broader definition of the concept. For decades, an inherently patriarchal discourse has dominated our conceptions of international affairs, which has led to an asymmetry in the understanding of how individuals view and interact with the world around them. The necessity of subverting this hegemonic discourse has been abundantly clear for many years, and contemporary world events only underscore this point. Furthermore, we must continue to incorporate gender into the study and application of international affairs from an interdisciplinary standpoint and a multifaceted approach. As our work on this Theme Section and the pieces within it have demonstrated, the question of gender in international affairs stretches far beyond a question of women in politics. At its core, conceptions of gender in the world shape the politics of everyday life and we are compelled to continue learning about all the different issues they touch upon.

Notes

- 1 Cynthia Enloe, *Bananas, Beaches and Bases: Making Feminist Sense of International Politics* (Berkeley: University of California Press, 1990).
- 2 Sheila Meintjes, Meredith Turshen and Anu Pillay, *The Aftermath: Women in Post-Conflict Transformation*, London: Zed Books, 2001.
- 3 Alexandra Novitskaya, "Patriotism, Sentiment, and Male Hysteria: Putin's Masculinity Politics and the Persecution of Non-Heterosexual Russians". *NORMA: International Journal for Masculinity Studies* 12:3-4, (2017): 302-318.
- 4 Caroline Criado-Perez, *Invisible Women: Data Bias in a World Designed for Men* (New York: Abrams, 2019).
- 5 United Nations, "UN supporting 'trapped' domestic violence victims during COVID-19 pandemic." UN online. June 12, 2020. <https://www.un.org/en/coronavirus/un-supporting-%E2%80%98trapped%E2%80%99-domestic-violence-victims-during-covid-19-pandemic>
- 6 Gillian Youngs, 'Feminist International Relations: A Contradiction in Terms? Or: Why Women and Gender are Essential to Understanding the World 'we' Live in', *International Affairs*, 80:1 (2004): 75-87 (p. 76).
- 7 William Clapton and Laura J Shepherd, "Lessons from Westeros: Gender and Power in *Game of Thrones*." *Politics* 37:1 (February 2017): 5-18.

THE EXPLOITATIVE USE OF WOMEN IN CONTEMPORARY LIBERAL DEVELOPMENT AGENDAS

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Abstract

When thinking about 'engendering change' in today's international arena, it is critical to consider how it is possible to engage globally with women in some of the world's most impoverished communities, whose poverty and oppression may rest on intersecting racial, socio-economic, and gendered prejudices, and where the impacts of hegemonic patriarchy appear most acutely. Therefore, focusing on the lives of women attempting to find an escape from poverty and considering the responsibilities of political and economic actors in our liberal international system. In contemporary efforts to actively engage with gender, this article will highlight a trend in which the responsibility for rebuilding and developing impoverished societies is pinned to women and wrongly promoted in the international arena as an 'empowering' role. By adding the burden of development to pre-existing gendered expectations of women, this ultimately diverts precious time and resources from alleviating the structural oppression suffered by women under the patriarchy.

This article aims to question whether the popularisation of 'economic empowerment' initiatives within the contemporary development discourse—initiatives aimed at targeting some of the world's most impoverished women globally—can successfully challenge the patriarchal status quo. Focusing on the impact of microfinance initiatives and female entrepreneurialism in the Global South, this piece will highlight how the current development agenda utilises women as economic pawns, benefitting the economic agendas of inherently patriarchal, neoliberal markets rather than meaningfully tackling poverty at a grassroots level. Ultimately, in pursuing a development agenda that continues to utilise women as platforms for economic development rather than considering the strategic gender aims needed to dismantle patriarchal structures, the 'empowerment' of women will remain an unattainable goal for the development community.

Introduction

Microfinance was a development initiative first championed

by Mohammed Yunus with the establishment of the Grameen Bank in 1983. The development model builds on Yunus's belief that 'we are all entrepreneurs', and that in order to alleviate poverty, isolated rural communities who lack access to essential financial services must be incorporated into the formal economic market.¹

Through the distribution of small loans, microfinance aims to 'empower' borrowers as economic agents to alleviate their poverty through entrepreneurial ventures.² Initially implemented as a gender-neutral development model, the popularisation of microfinance has driven a rise in female-centred projects, with an estimated 94 million women becoming involved in microfinance.³ Such a trend within Micro-Finance Initiatives (MFIs) aligns itself with an overarching global movement to recognise and engage with the disproportionate number of women living below the poverty line predominantly in the Global South.⁴ Therefore, a recognition of the feminisation of poverty has increased the initial appeal of 'economic empowerment' development models as an approach which attempts to engage with salient issues related to gender and economic inequalities simultaneously. However, as this piece will critically assess, despite its popularisation within the development discourse, microfinance cannot simply be assumed to be a 'magic silver bullet' for poverty and disempowerment in the Global South.⁵

Though such a development model interacts with practical gender interests—for instance, providing women with access to finance—it arguably overlooks what Maxine Molyneux identifies as the strategic interests of women. These aim to address and overcome female subordination under patriarchal structures, centring on issues such as the sexual division of labour or institutionalised discrimination: a focus Molyneux describes as 'the one most frequently considered by feminists to be [in] women's "real" interests'.⁶ As this article aims to highlight, the definitional elasticity which underpins the notion of female 'empowerment' has subsequently allowed a gulf to emerge between the aims of development initiatives and strategic gender goals of women in the Global South. When considered as an aspect of 'transnational business feminism'—an approach rooted in Western liberal feminism which focuses on economic growth—microfinance can be seen to contribute to the neoliberal politico-economic system.⁷ Consequently, economic development initiatives such as microfinance offer restrictive forms of female empowerment, as they rest on the assumption that limited access to finance is the predominant cause of a woman's poverty and oppression in the Global South. As the latter half of this piece shall emphasise, engendering change in today's international patriarchal system requires a more holistic approach to the causes of oppression and poverty.

When critically assessing MFIs, we must first examine *why* and *how* women are included in microfinance, identifying within traditional development agencies and commercial actors the ulterior incentives

to engage with female ‘empowerment’ initiatives in the Global South. Arguing that the simple inclusion of women in microfinance cannot secure strategic feminist goals, drawing a line between female inclusion and active female participation. Furthermore, we find that when commercial interests and profit underpin microfinance projects, not only do MFIs fail to challenge patriarchal structures, but they also further utilise women as economic pawns for their financial gain. Throughout, examples of microfinance in the Global South have been chosen to emphasise the disproportionate levels of risk shared between MFIs and female borrowers, and these examples aim to highlight how microfinance initiatives first and foremost serve a commercial purpose rather than the interests of those individuals at a grassroots level. Ultimately, this invites us to question whether such a development model can ever truly ‘empower’ women, and to ask where reform must take place in order to maximise the impact of initiatives on women living under hegemonic patriarchy. This is a notion that this article will touch on by considering the future of microfinance and the ‘empowerment’ of women in the Global South, ultimately recommending that organisations adopt a more comprehensive approach to female poverty and oppression.

Why are women given particular attention in microfinance initiatives?

When considering how effectively microfinance initiatives engage with the dynamics of gender, we must begin by challenging some of the grounding logic for why microfinance institutions enthusiastically seek to ‘include’ women in their development agendas. When scrutinised, the de-velopment agendas and commercial interests of MFIs which promote the inclusion of women seem problematic, appearing to utilise aspects of patriarchy such as gender roles to encourage development in the Global South. Moreover, they rely on patriarchal structures to maximise the level of control MFIs have over their female borrowers and therefore minimise any financial risks for loan distributors.

The burden of development

The logic for some MFIs to engage specifically with women as economic agents relates to patriarchal gender roles, which provide organisations with the opportunity to expand their reach, and utilise female domestic influence to encourage development within a household, as well as in the wider community. Women are therefore perceived by MFIs to be valuable platforms on which to build inroads for future development within an impoverished society. This is a notion supported in the work of Lakshmi Kamur, who recognises that on average female borrowers were more ‘likely to share the fruits of the investment with

the entire household', owing to their traditional gender roles.⁸ Such an approach consequently encourages women to take on what Caroline Moser terms the 'triple responsibility'—fulfilling roles simultaneously in the home, workforce, and wider community.⁹

However, such an approach ultimately shows little appreciation for how such gender roles may negatively impact the wellbeing of many women. Building on the notion of 'triple responsibility', Esayas Bekele Geleta highlights that female inclusion in microfinance will not typically alter the division of labour within a household and, 'despite helping women earn a small income, microfinance systems do not stop women's usual obligations, such as housework and childcare'.¹⁰ Therefore, despite including women in its development agenda, microfinance can be seen to overlook essential strategic gender interests identified by Molyneux to represent the long-term collective interests of women, such as 'the abolition of the sexual division of labour' and 'the alleviation of the burden of domestic labour and childcare'.¹¹ Moreover, when we consider in the Global South that 'housework' commonly includes non-market manual labour, such as agricultural work, this demonstrates how microfinance only adds a significant 'burden of development' to already demanding gendered expectations for female borrowers.¹² Therefore, we must be cautious in assuming that the inclusion of women is synonymous with pursuing meaningful empowerment rather than it utilising women as a valuable platform for fulfilling wider development agendas.

Such a development model has been employed by the longest standing MFI, the Grameen Bank, which provides access to small loans for the 'poorest of the poor' throughout Bangladesh and champions the notion that '[women] change not only their lives but also the lives of their families and communities', suggesting that female inclusion is the shortest path to economically reforming a society.¹³ While this may be a well-intentioned attempt at maximising the developmental impact of microfinance in some of the globe's poorest regions, such an approach reinforces this patriarchal perception of a 'triple responsibility'.¹⁴ As highlighted in the work of Soma Kishore Parthasarathy, this approach is grounded in flawed, 'essentialist' perceptions of a woman's duty to others, and ultimately helps to preserve and further perpetuate conventional intra-household power imbalances shaped by patriarchy.¹⁵ Building on Parthasarathy's observations, the involvement of over 8.8 million women in Grameen Bank microfinance initiatives reveals to us the extent to which misdirected initiatives overlook the strategic gender interests of a significant number of marginalised women.

For this reason, it is vital to remain critical of why MFIs adopt a gendered approach in their development agendas. When scholars consider the rewards for NGOs which litter project proposals with 'buzzwords' such as 'female empowerment', it suggests the grounding logic for the inclusion of women in microfinance is more closely aligned

with institutional interests than those of individual borrowers.¹⁶ It appears as though this is rooted in the definitional ambiguity which underpins the notion of 'female empowerment', resulting in the term being utilised loosely by MFIs to serve their own interests rather than meaningfully pursuing the strategic gender interests of women in the Global South.¹⁷ Once again the grounding logic for female inclusion in the work of the Grameen Bank appears problematic, as Lamia Karim observes that through a strong central focus on the impoverished female population of Bangladesh, the organisation has strategically aligned itself with wider 'global mandates of empowering women, thus allowing the Bank to garner resources for its growth'.¹⁸ Such a notion highlights the vested interest MFIs have to promote an overly simple narrative which proclaims that microfinance can indeed empower women in the Global South.¹⁹ Therefore, while an increasingly female-centred international development discourse should be celebrated as a significant step, it is important to critically assess these development models which target women. In doing so, we can consider whether women are being included by MFIs for their individual benefit or being exploited in order to ensure the development of the wider community.

The commercialisation of microfinance

Owing to the popularity of economic empowerment initiatives, microfinance has expanded beyond the work of development agencies and has been enthusiastically adopted by commercial actors in the Global South in search of profit.²⁰ Such a trend has prompted critics to argue that microfinance has fallen victim to its own success, giving rise to what Tim Harford identifies as an ongoing 'battle for the soul of microfinance', one in which commercial interests have encroached on the traditional developmental goals of MFIs.²¹ Once embodying a development model that prided itself on operating in many deprived communities without access to financial services, microfinance has successfully financialised many areas in the Global South, creating what Philip Mader identifies as 'fertile spaces ready for financial settlement and enclosure'.²² This is reflected in the financialisation of Compartamos Banco (CB), the largest MFI in Latin America, which provides access to financial services to over 2.5 million users.²³ Founded in 1990, CB began as a non-profit organisation and quickly grew in response to the large numbers who sought access to basic financial services—a demand which appears inexhaustible given that it is estimated that around 210 million people live in Latin America without access to a bank account.²⁴ The MFI, however, since obtaining its commercial banking license in 2006, has undergone a dramatic transformation, reorienting its development model to pursue a profit-oriented, commercial agenda. Consequently, borrowers are being charged interest rates 'that would make credit-card

companies blush', imposing over one hundred percent annual interest on its loans in pursuit of making a profit from microfinance projects.²⁵ Rob Aitken argues that CB is an example of an MFI which has evolved to adopt a wholly self-serving financial agenda, and interest rates imposed on borrowers 'are designed primarily not to finance expansion but to constitute microfinance as a financial object [...] capable of generating and sustaining forms of financial profit and accumulation'.²⁶ This observation demonstrates the mission shift within the micro-finance sector, where commercialisation has allowed poverty in the Global South to become utilised as an economic resource.²⁷ Ultimately, when thinking about immediate changes necessary within micro-finance, it appears critical to regulate commercial actors and cap loan interest rates—a possible action which may decrease the likelihood of impoverished borrowers becoming trapped in vicious cycles of debt.²⁸

CB is not alone in adopting a commercial strategy, and the financialisation of microfinance is reflected in the transformation of other significant MFIs, such as Banco Solodario of Bolivia which now operates as a 'fully-fledged bank that listed its instruments on Wall Street'.²⁹ Such a transformation within microfinance is further reinforced through the influx of commercially-interested economic actors, such as international banks, equity funders, and insurance companies which make up the fastest-growing investment group in the development model rather than typical not-for-profit actors such as NGOs.³⁰ This reinforces Lourdes Benería's summation that owing to their economic nature, microfinance is vulnerable 'to sly manoeuvring and co-option', and subsequently can be 'used to complement the neoliberal policy framework', a structure that does little to feign engagement with the best interests of the globe's marginalised people.³¹ In doing so, this pattern challenges the ongoing characterisation of microfinance as a philanthropic development tool, a notion which ultimately overlooks the commercial interests that underpin the actions of some of the most significant microfinance organisations.

The commercialisation of MFIs is a significant trend to acknowledge when considering why microfinance initiatives target women. Historically overlooked by mainstream financial institutions, impoverished women in the Global South are now becoming recognised as valuable 'untapped' economic resources and because of their incorporation into capitalist systems of reproduction, reinforce 'the business case for gender equality'.³² This is a trend which shows no signs of slowing as commercial actors come to appreciate the monetary and social value in engaging with women as economic agents in microfinance.³³ Moreover, Adrienne Roberts identifies that the enthusiasm for engagement with women through economic empowerment initiatives is in part related to 'its perceived social value which enhance[s] a company's image and appeal[s] to socially conscious investors'.³⁴ Therefore, when considering

why microfinance programmes target women, it is important to recognise the economic opportunities they present for microfinance institutions and consequently, the risk of female borrowers being exploited as economic pawns for the financial gain of MFIs.³⁵

For microfinance institutions, female borrowers present organisations with a valuable economic opportunity, owing to the increased levels of security a woman can typically offer on an MFI's investment. This is a sentiment evident in Karim's observations, which conclude that on average ninety-eight percent of female Bangladeshi borrowers repay their loans, and therefore MFIs intentionally targeted women as a means of minimising the financial risks associated with the distribution of loans.³⁶ This notion appears throughout the literature, as Kate Maclean similarly concludes that female borrowers in Bolivia were perceived to be appealing, low-risk investments.³⁷ Therefore, women engaged in microfinance are perceived to offer MFIs greater security on their investment and, for an organisation, minimise any financial risks. However, it is important to note that these ulterior economic motives for MFIs to target female borrowers are not explicitly stated aims in the development agendas of organisations and, building on the work of James Scott and Aminur Rahman, could be argued to represent a 'hidden transcript'.³⁸ Rahman defines 'hidden transcripts' in microfinance as motives which are informally recognised within an MFI and significantly influence the actions of an organisation.³⁹ In his critical assessment of the Grameen Bank, Rahman identifies that bank workers pursued a hidden transcript by recruiting female borrowers in order to increase the likelihood of loan repayment. Therefore, when thinking about why microfinance institutions seek to empower women in the Global South economically, it is important to acknowledge the commercial logic in targeting female borrowers.

In contrast to this, the notion of risk translates very differently on the ground for women engaged in microfinance. While decreasing financial risks for MFIs, the literature reveals that female borrowers typically face an increased number of challenges when repaying loans because of patriarchal expectations. Given female borrowers' typical engagement in a 'triple responsibility', the circumstances which enable women to repay loans will also include the health and stability of other household members present female borrowers with an increased number of considerations to account for when attempting to fulfil loan conditions.⁴⁰ It is as a result of this added responsibility for female borrowers that Anne Marie Goetz et al. identify a trend among women, who are forced to sell off vital domestic assets or engage with numerous MFI loans in order to pay off preexisting debts.⁴¹ These trends among microfinance users thus impede the entrepreneurial efforts of borrowers, creating a cycle of debt and highlighting the often self-defeating characteristics of MFIs' development agendas. Therefore, when considering the inclusion

of women in microfinance, it is critical to consider the relationship as ultimately one of 'power and inequality between the lender, resource-rich loan institutions, and the financially strapped borrowers', rather than simply a development model.⁴²

How are women included as economic agents?

When assessing the abilities of MFIs to 'empower' women out of poverty and patriarchy in the Global South, it is significant to consider *how* women are included in microfinance initiatives as economic agents and how MFIs interact with female borrowers. In doing so, it is apparent that MFIs fail to challenge structural inequalities and in fact can be seen to utilise patriarchal structures in order to control female borrowers in order to ensure loan repayment.⁴³

Structurally, MFIs favour the use of self-help groups and solidarity lending models. These are models that rely on small groups to share the responsibility of a loan collectively and are intended to establish a local social support network among local women. Building on the work of Robert Putnam, advocates of these models argue that solidarity lending can successfully empower women through the creation of 'social capital', a concept based on facilitating 'social connectedness, mutual trust, and reciprocity', and a notion Putnam argues to be an essential feature for development.⁴⁴ However, such an approach rests on the underlying assumption that these models can, in fact, achieve social capital for their female participants, however in practice, the use of self-help groups within MFIs promotes a trend among female borrowers which further entrenches patriarchal norms and values for the commercial purposes of lenders.⁴⁵

It is critical to note that these structures created by MFIs do not exist beyond established structural hierarchies and inequalities faced by female borrowers. Consequently, MFIs can utilise the 'positional vulnerability' of women living in patriarchal societies as a tool to secure the financial interests of lenders.⁴⁶ Far from socially empowering women, given the threat that one member's inability to repay will jeopardise financial access for the entire group, self-help groups can be seen to increase the chances of social exclusion and further marginalisation for the most vulnerable in society.⁴⁷ This is reflected in Naila Kabeer's conclusions that marginalised sections of society participating in microfinance will find themselves 'either excluded from the social networks that matter or else included on highly asymmetrical terms'.⁴⁸ Overall, for women as marginalised members of patriarchal societies, this suggests that instead of empowering female borrowers, MFIs may simply replicate asymmetrical power structures at a micro-level.

In contrast, the distribution of loans using self-help groups benefits the commercial interests of MFIs. For MFIs, such an approach

is economically efficient, minimising administrative costs for operators relating to managing and organising participants, and increases the likelihood of loan repayment as borrowers pledge both financial and social collateral to lenders.⁴⁹ In particular, owing to social norms and values perpetuated within patriarchal structures, the stigma and shame associated with debt ensures that the social collateral provided by solidarity lending is especially effective in ensuring high levels of loan repayment among female borrowers. Rahman finds that the use of solidarity groups breeds 'peer pressure' within groups, rather than establishing supportive networks that unite and socially integrate women collectively.⁵⁰ This is a notion reflected throughout the literature, as the use of solidarity groups can be seen to fuel infighting and hostilities among group members, as these structures encourage them to observe and criticise the lives of other women closely.⁵¹ This is an important feature when considering the impact of microfinance, as by socially alienating women from one another, Moser argues this undermines an essential precondition for the strategic empowerment of women.⁵² Far from uniting women, the use of social collateral within microfinance encourages groups to recover loans on behalf of MFIs in order to ensure the individual security of group members. In extreme instances, there have been cases in which children have been kidnapped by members within solidarity lending structures, blackmailing borrowers into loan repayment.⁵³ Furthermore, for female borrowers who were unable to repay their loans, MFIs also exploit the 'positional vulnerability' of women in order to recover what they are owed. Karim highlights that women were made examples of and publicly humiliated as a means of recovering loans, exploiting the societal norm that for women living under patriarchal structures, 'a public shaming for a poor woman is the equivalent of the loss of family honour'.⁵⁴

Such an approach, while economically efficient at ensuring loan repayment among groups, is immoral and a far cry from 'empowering' impoverished women in the Global South. Therefore, granting female borrowers greater responsibility does not *always* equate to social empowerment or liberation. Many academics highlight that through engaging with MFIs, women are leaving themselves vulnerable to exploitation within yet another structure, and microfinance has the potential to disempower just as many women as it claims to liberate. As Rosalind Gill highlights, microfinance requires women 'to bear full responsibility for their life biography no matter how severe the constraints upon their action'.⁵⁵ In doing so, MFIs overlook many of the structural obstacles faced by impoverished women, and attribute the failings of entrepreneurial ventures to the capability and willpower of borrowers, thus compounding this notion of disempowerment among already marginalised women.

The consequences of public shaming reoccur all too clearly within the literature and further highlight how microfinance can

disempower the women engaged in its development agenda. High profile cases, such as the suicide of Rama Peadda Boiana in January 2011, highlight the unmanageable levels of stress cultivated by the recovery of microfinance loans and their impact on the wellbeing of many women in the Global South. In line with the narrative presented by development actors, as a community leader in Palivelupa, central India, and mother of three, it could be argued that Rama – regarded locally to be both ‘clever and hardworking’ – presented MFIs with a promising opportunity for female empowerment.⁵⁶ However, as the leader of a self-help group indebted to half a dozen MFIs, the suicide of Rama Peadda Boiana all too clearly highlights the dangers of solidarity lending models for those women engaged in microfinance. As locally Rama’s death – which is acknowledged to directly stem from a sense of guilt and responsibility for the debt of other villagers – has ultimately stripped Palivelupa of a valuable community member and for the Boiana family, further increased pressure on its already impoverished circumstances.⁵⁷ The death of a woman supposedly ‘empowered’ by microfinance highlights the overly simplified narrative presented by the development discourse regarding microfinance, as the numbers of women engaged do not equate to meaningful development at a grassroots level. Sadly, Rama’s death is part of a wider trend in microfinance, as the Grameen Bank has been held responsible for fifty-one suicides in one Indian province of Andhra Pradesh alone.⁵⁸ This trend of suicide within micro-finance is directly linked to its economic focus and the pressures placed on borrowers to ensure it is a self-sustaining economic model. Such a focus on recovering loans has caused microfinance to become a ‘death trap’ for some of the world’s poorest women, who have found themselves in a cycle of microfinance debt.⁵⁹ Overall, this again reinforces the notion that any development celebrated by MFIs is far removed from the general wellbeing of its female borrowers.

The role of patriarchy

When considering the inclusion of women within MFPs, it is essential to distinguish between female inclusion and active female participation. The literature reveals that, even within countries hailed as success stories such as Bangladesh, it would be a gross overstatement to suggest that MFIs provide female service users with meaningful access to loans, let alone go as far as to empower women as independent economic actors. Building on a trend identified by Goetz et al. in Bangladesh, Karim’s research affirms the staggering number of women who are only engaged with MFIs at a very elementary level; on average, for ninety percent of female borrowers, the future of a loan would become dictated by their husbands.⁶⁰ This not only highlights the problems posed by patriarchy to development efforts, but also undermines the notion that

access to capital alone has the power to ensure economic independence for women from the control of male relatives. Furthermore, it is important to consider how, in targeting female borrowers, microfinance can risk women in the Global South becoming exploited as financial resources. Rahman argues that this is a notion that is informally recognised within Grameen Bank projects and intentionally overlooked.⁶¹ Consequently, the exploitation of female borrowers is an entrenched and norm-alised characteristic within microfinance, as Robin Isserles identifies women as being utilised as 'vessels for men's economic activity'.⁶² This is a position that reinforces gendered identities within a household, and ultimately allows for the continuation of patriarchal ideology which encourages 'entitlement primarily to men and denies women control of economic resources in the household'.⁶³

Moreover, any positive results of microfinance are distributed within normative and exploitative frameworks and therefore fail to improve the lives of marginalised women. This is revealed when we consider how a loan is circulated in a community, in which female borrowers represent only a small link in a wider chain. As has been previously highlighted, those that originally as-sumed responsibility for a loan undertake the largest risk, such as the material and social losses associated with defaulting on loan repayments. However, Maclean argues that when successful entrepreneurs go on to grow a business and thus create jobs in a local community, the gender di-vision of labour will often ensure that these employment opportunities are enjoyed by men.⁶⁴ And while this may help the development of a local economy, such an outcome of microfinance does not go far to ensure structural change exclusively for women. When scholars consider this, it suggests that in order to include and empower women as economic agents, microfinance must go beyond initial loan distribution to ensure that these development efforts can address 'strategic gender issues' such as the division of labour.⁶⁵

Does microfinance 'empower' women?

Microfinance presents us with an appealing, yet overly simplistic narrative for empowering women in the Global South. It is a development agenda that has reconceptualised female em-powerment through the lens of transnational business feminism to promote engagement with pre-existing financial markets.⁶⁶ Such an approach feeds into the wider capitalist system and ensures the continuation of the status quo rather than challenging those power relations which feed into female oppression. When scrutinised, microfinance can only achieve limited results in comparison to its ambitious promises to empower women, as the very essence of employing women as economic agents in a patriarchal financial structure facilitates their subordination and exploitation.⁶⁷

Many critical scholars urge us to question just how much is to be expected from the wider social impacts of microfinance when it is primarily an economic policy. Lynn Horton's conclusions highlight that while microfinance attempts to engage with a form of 'market empowerment', it stops short of enabling 'transformative' long-term change for women in the Global South as it fails to challenge the existence of hegemonic patriarchy.⁶⁸ The notion of market empowerment rests on an assumption that through the extension of neoliberal markets into many of the world's most impoverished societies, opportunities and subsequent empowerment of women will inevitably follow suit. Such a development strategy suggests that economic poverty is the source of women's disempowerment and may overlook 'broader historical, cultural and gender contexts' which feed into the nature of a person's overarching state of poverty and oppression.⁶⁹

When evaluating the possibilities for microfinance to empower, we must begin by questioning 'the assumption that markets are an emancipatory domain', and whether MFIs can challenge those other sources of oppression faced by women through economics alone.⁷⁰ As previously established, through the incorporation of women into inherently gendered structures of global financial markets, microfinance replicates and reinforces patriarchal obstacles and prejudices familiar to many at a local level, therefore limiting the extent to which participants can be viewed as becoming 'empowered'. Goetz et al reinforce this notion, as they highlight that the introduction of women into financial markets was regularly met with hostility and harassment.⁷¹ The risk of female entrepreneurs being harassed within economic structures demonstrates how market empowerment does not immediately alter the balance of power between genders, inherent within patriarchal structures, and suggests that economic forces alone cannot accomplish this. Therefore, without engaging with transformative empowerment for women, microfinance replicates and reinforces patriarchal structures through financial systems.

Consequently, there is a risk that female entrepreneurs will be encouraged to engage in 'patriarchal bargains'.⁷² This is a concept which describes women acting strategically in order to increase their likelihood of success while still operating from within gendered structures.⁷³ While possibly effective for women at an individual level, these bargains leave overarching patriarchal structures unaddressed and therefore cannot facilitate transformational change. Such a trend is present within microfinance initiatives; Karim highlights that the main logic behind many female borrowers becoming money-lenders in Bangladesh represented a form of patriarchal bargaining underpinned by the fact that 'in such situations, women did not lose their honour because they stayed

inside their homes'.⁷⁴ Gender roles, therefore, place limitations on female entrepreneurs, reinforcing gender stereotypes and isolating women inside the home, a structure Sylvia Walby identifies as inherently patriarchal.⁷⁵ Therefore, the occurrence of patriarchal bargaining demonstrates that the economic liberation of women does not directly translate into the social liberation from gendered expectations. It reinforces the notion that microfinance fails to challenge or deconstruct patriarchal norms and values and emphasises the need for such a development agenda to be conscious of the patriarchal settings in which it implements its initiatives.

Unless microfinance challenges the existence of patriarchal prejudices against women, its ability to ensure even market empowerment may also be limited. MFIs can be seen to offer unequal market opportunities for male and female borrowers, institutionalising gender bias and creating a 'glass ceiling' for women included in microfinance.⁷⁶ In their findings, Isabelle Agier and Ariane Szafarz identify a gender gap in the size of loans distributed between male and female borrowers with similar financial backgrounds, revealing that on average, female borrowers in Brazil received 1,238 Brazilian Real—approximately 178 British Pound Sterling—less than male borrowers.⁷⁷ The existence of such a gap stems from gender biases that are inherent within patriarchal societies and encourage institutional discrimination against women participating in microfinance projects. This is a feature of microfinance which Agier and Szafarz argue is structurally enabled by the decentralised and unregulated nature of MFIs across the Global South, which allows for 'extensive leeway' to be given to microfinance officers to perpetuate gender stereotypes.⁷⁸

Furthermore, the impact of patriarchal gender expectations within microfinance is reflected in the increased levels of female disadvantage faced by married women. Several authors note this trend, concluding that MFIs used criteria for loan distribution based on patriarchal perceptions of married women to limit their loan size.⁷⁹ Loan distributors appeared less confident in married women's entrepreneurial capabilities, owing to beliefs that a woman's domestic responsibilities would limit these.⁸⁰ This is an interesting point to note, as it emphasises that women seeking empowerment in the Global South are not one single homogenous group and instead, face varying degrees of societal prejudice, a notion which is overlooked in the organisational approach of MFIs. Therefore, by not explicitly challenging patriarchal perceptions, microfinance fails to provide equal market opportunities to male and female borrowers, and the occurrence of credit-rationing highlights how female inclusion within microfinance cannot mitigate pre-existing prejudices which disadvantage women and fail to challenge their structural position under hegemonic patriarchy.⁸¹

As we have established, the long-term effects of MFIs since their popularisation during the 1980s, has tarnished the reputation of microfinance within the contemporary development discourse. In fact, one organisation aimed at alleviating poverty across Kenya and Uganda, Balloon Ventures, reinforced this point with their publication of a three-part series entitled, 'Don't Call Us Microfinance!'⁸² However, looking forward in pursuit of 'engendering change' in today's international arena, it is crucial to consider given the sheer scale of microfinance globally how MFIs can structurally readjust to align with the interests of women in the Global South and overall move closer to enabling meaningful female empowerment. As we have established throughout this piece, the nature of a woman's poverty and oppression is multifaceted and dynamic, requiring more than merely access to financial services. Therefore, this section will consider possible actions of MFIs which ultimately encourage the adoption of a more holistic approach to the causes of oppression and poverty for women living in the Global South.

First, we should begin by acknowledging the overinflated nature of the female 'empowerment' that has been presented by the development industry as having been achieved by MFIs. As Kabeer highlights, within Bangladesh alone, most studies into the impact of microfinance have been gathered internally by MFIs themselves, and are typically quantitative studies that are unable to appreciate the multifaceted nature of female empowerment.⁸³ Therefore, at present, microfinance is only concerned with female empowerment at a very elementary level and does not evaluate the capacity for MFIs to change the life of a female borrower, using 'their interpersonal relations, [and a] women's capacity to participate in public life of their community' through microfinance initiatives.⁸⁴ However, as aforementioned, due to the beneficial nature to the wider global economic system of including women as economic agents, Supriya Garikipati et al. suggest that 'the sector has a vested interest in retaining this simple narrative' regarding microfinance and the empowerment of women in the Global South.⁸⁵ Moving forward, we must therefore break down this 'simple narrative' and disaggregate the many forms of female 'empowerment' as conceptualised in the work of Horton.⁸⁶ With a healthy amount of scepticism, we must ultimately abandon the notion that any one development model may provide that mythical 'silver bullet' to solve disempowerment in the Global South.⁸⁷

Furthermore, highlighted throughout this piece, the inclusion of women in microfinance should not be assumed to amount to active female participation. In order to address this issue within microfinance, it is important that MFIs engage with the structural issues which are faced by women in the Global South and feed into their states of oppression. At present, patriarchal gender expectations, such as the

sexual division of labour and the burden of domestic responsibilities ascribed to women, continue to act as obstacles to meaningful female empowerment. While deeply entrenched features of patriarchy, MFIs can minimise the impact of structural inequalities on female borrowers by supplementing economic support with a greater educational emphasis in their development projects. This builds on Karim's observation that female borrowers who exercised complete control over their loans had marketable skills, revealing an opening for MFIs.⁸⁸ Female borrowers' lack of control over loans is a significant problem within microfinance programmes highlighted throughout the literature, as it is estimated that less than ten percent of women had complete control over the use of their loans independent of male relatives, and they encountered problems which could be addressed through using civil society activities alongside loan distribution.⁸⁹ Possible action could include encouraging greater levels of literacy among borrowers, providing women with a larger number of business opportunities. This is a course of action which has proven beneficial to women in Kerala, a southwestern state in India which has achieved high levels of female education and literacy comparable to many 'developed' states in the Global North.⁹⁰

It is this factor that Knut-Erland Berglund argues allows women in Kerala greater freedom to enter employment in other areas of the job market beyond agricultural labour, a low-paid sector that throughout India is dominated by women.⁹¹ Moreover, such an approach provides an opportunity to address the sexual division of labour faced by female entrepreneurs, and therefore creates female empowerment which mirrors strategic gender interests.⁹²

Finally, having considered the commercialisation of microfinance that has become steadily integrated with neo-liberal financial markets, it is important to realign perceptions of microfinance with these changes.⁹³ In pursuing a development agenda that continues to utilise women as platforms for economic development rather than considering the strategic gender aims needed to dismantle patriarchal structures, the 'empowerment' of women will remain an unattainable goal for the development community. Therefore, greater regulation is needed to ensure that the poverty of women in the Global South does not become an economic resource that can be exploited by commercial actors. An important starting point is challenging the rates of interest attached to loans, such as those set by CB in Latin America, that create profit for MFIs while driving borrowers into vicious cycles of debt.⁹⁴

Overall, when thinking about 'engendering change' in today's international arena, there appears to be a gap between the ambitious rhetoric of MFIs, and their ability to 'empower' women in line with strategic gender interests. In fact, by overlooking the structural issues rooted in patriarchy that affect impoverished women in the Global South, MFIs can be seen to reinforce many gender stereotypes which facilitate

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WOMEN'S COLLECTIVES AS VEHICLES OF EMPOWERMENT AND SOCIAL CHANGE: CASE STUDY OF WOMEN'S SELF HELP GROUPS IN ODISHA, INDIA

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Abstract

This paper explores the growth and evolution of women's agency and leadership through women's thrift and credit collectives known as the Self-Help Groups (SHGs) in Odisha, an eastern province of India. The paper intends to analyse the manner in which these women collectives have been responsible for micro-capital generation and have graduated from being passive moneylenders to impacting family and community-level decision making. The paper will also discuss how these SHGs, by ensuring financial autonomy to rural women, have enabled them to climb the layered empowerment ladder. While sustained economic functions have helped them graduate from merely a savings outfit to investing on small scale income-generating ventures to disbursing farm credit, the decision making functions of these women's collectives have gone a long way in impacting village development decisions and are not limited to thrift and credit only.

Background of SHGs in Development

Women's participation in the process of economic and social development has been central to development discourse in recent years. The Millennium Development Goals and Sustainable Development Goals have articulated Gender Equality as a significant determinant to measure the degree of development achieved by a particular nation state. This begs the question as to why gender equality is considered so vital? While feminism as an assertive movement to provide equal rights for women started in the early twentieth century, women as essential partners in poverty alleviation, especially in developing countries, became popular in 1970s. Conventional approaches to poverty alleviation – largely placed within the economic framework and social welfarist approach – looked at industrialisation and provision of basic services like health,

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nutrition, and water supply. However, it was realised that poverty was a multidimensional concern and could not be addressed through a linear or single path. With its roots grounded strongly in the cultural and social composition of societies, it was imperative to have alternative approaches that required a change in social and cultural structures and institutions to impact poverty levels.

Ponna Wignaraja's ground-breaking research from across South Asia, sub-Saharan Africa, and Latin America suggests two important claims that facilitated restructuring poverty alleviation programmes in developing countries. The evidence indicates that 'the poor are left out because the conceptual framework and the institutional framework within which the problem is looked at is inadequate'.¹ His analysis also evidenced that traditional anti-poverty programmes did not recognise role of women in development, nor did they analyse the factors that prevented women from accessing the benefits of development. His research first announced that women, especially poor women, undergo a double burden of poverty – the burden of being poor, and because they are women, the burden of being subjected to unequitable social systems, cultural practices, and gender norms through traditional structures and institutions that are not only disempowering in nature but also limit their participation in process of social change. The solution to poverty therefore had to be multidimensional, including considerations of how to address poverty amongst women, and bearing in mind that the solution to women's poverty could only come about from actions from women, organised into groups with an intent to participate in the process of development by effecting positive social change.²

Two of the most popular, innovative, and internationally acclaimed approaches that marked women's participation in the process of development came from South Asia – the Grameen Bank and Bangladesh Rural Advancement Committee (BRAC) models from Bangladesh in 1971, and the Chipko Movement and Self-Employed Women's Association in India in 1970s. Grameen Bank was started by Mohammed Yunus – literally meaning the 'village bank' – attempted to create an alternative banking system for the poor, especially poor women, by establishing small credit societies. It eventually turned into a public institution and overcame limitations of formal banking systems by establishing informal and people-friendly banking mechanisms, providing easy loans to poor people without bureaucratic hassles perpetuated by nationalised banking systems. BRAC was an NGO in Bangladesh led by Fazle Hassan Abed, which placed great emphasis on generating awareness, social consciousness, and empowerment amongst women as part of the Bangladesh refugee rehabilitation initiatives. BRAC established a simple thrift and credit system that resembled present day self-help groups. The Chipko movement originated in the Himalayan region of Uttar Pradesh, now Uttarakhand, in 1973 which was a local form of protest to save trees and forests being cut by loggers and

timber traders. The Hindi word ‘chipko’ means ‘to hug’ or ‘to cling to’, and reflects the demonstrators’ primary tactic of embracing the trees to impede the loggers. Most protestors were women organised into groups. All the models were based on the premise that women’s participation in the process of development through economic and social empowerment is not only necessary, but non-negotiable. SEWA, meaning ‘service’, was started by Ella Bhatt in Ahmedabad in Gujrat. It looked at organising poor women into groups to promote rights to income and independently employed female workers through organising them into groups who could then sustain themselves through self-employment—starting with weaving, designing, and stitching clothes.

These experiments and contemporary empirical research in low and middle-income countries suggests that these village-level thrift and credit platforms significantly impact levels of empowerment of poor women through building leadership and agency. In addition, field evidence indicates visible changes in self-perception, self-esteem, identity, and efficacy. One indicator of such enhanced agency within women is the strategic policy shifts within these countries towards introduction of gender-centric public investments and gender inclusion policy to enable women’s lead in bringing about desired social change.³

Context

Odisha is one of the larger states in India, and the first to get statehood on the basis of its linguistic identity in 1936, years before India gained its independence. Until recently, Odisha was considered a backward state—poor and un-industrialised, with an uneven exposure to development due to development’s low reach into marginalised, tribally-dominated districts and remote hilly tracts. However, the state did not insulate itself from the general poverty alleviation programmes adopted at the national level by the flourishing and richer states.⁴

After the success of Grameen Bank in Bangladesh, many developing countries including India adopted SHGs. The concept was simple: about twenty women were organised into groups as members; each member was expected to deposit a scheduled amount of cash, and the accrued amount would be used by members during times of economic stress. A secretary and treasurer were assigned from within the members, with clear delineation of roles and responsibilities. This was essentially a mechanism of easy access to non-institutional credit by the poor women who formed the base of the poverty pyramid. This thrift and credit system was perceived as a successful trajectory for poverty alleviation in poor communities, to provide a degree of economic reliance to poor women and empower them to contribute to family income through a habit of systematic saving. A study conducted on SHGs in Odisha showed that ‘the main objective of the group are [sic] to improve the economic and

social status of the members in terms of their needs and interests'.⁵

The study in Odisha showed that SHGs came into existence in early 1990s and that about forty-five percent of women SHGs were promoted by NGOs. The remaining fifty-five percent were promoted under different schemes of the government, such as Swarnajyoti Gram Swarozgar Yojana, Indira Mahila Yojana, and commercial banks. However, the importance of SHGs to address poverty became significant when the Reserve Bank of India issued a circular in 1992 to link SHGs to banks through a National Bank for Agriculture and Rural Development-NGO linkage scheme.⁶ This was a strategic move that brought SHGs into the financial landscape, and this helped to link about ninety-four million poor with banks via seven and a half million SHGs, availing them of collateral free credit.⁷ The study also showed however that not all SHGs uniformly understood the objectives of SHGs; over fifty-five percent of them were functional and collected money on a regular basis. One of the key findings highlight that women's SHGs as a mechanism to address poverty alleviation would be limited if the participation of women was not full and complete. By 2000, there were over 4,039 SHGs in Odisha.⁸ The analysis importantly shows that most women SHG memberships were primarily from the general category.⁹ The 'real' vulnerable groups, at the bottom of the pyramid and experiencing poverty, were not part of the initiative either by chance or design.

The objective of involving women in organisations in a thrift and credit relationship was not only to provide income-generating activities to women. This collectivisation had the larger social objective of empowering women to realise their basic rights to equality and gender equity. The empowerment and autonomy of women and the improvement of their political, social, economic, and health status was a highly important end in itself. The SHG platform adapts the existing microfinance model of SHGs and not only delivers banking, saving, and financial services, but also health, nutrition, education, and an awareness on civil and political rights.

In 2001, the Chief Minister of Odisha launched a new flagship programme to support women's collectives which aimed at empowering women socially and economically. The programme, called Mission Shakti, was launched as a directorate under the Women and Child Development Department. Translated as rendering power to women, 'shakti', in Indian religious philosophy refers to 'feminine energy'. The statement made through the launch of this mission was to give strength to women with an intention to reverse gender inequalities perpetuated across communities through making women economically independent. It looked at formally scaling up the SHG programme with government support by using the conventional thrift and credit activities, creating cash flow to women's groups, and making cash available to women during emergencies, thus becoming a vehicle for micro-capital generation. Mission Shakti supports

women collectives in a number of ways. Apart from facilitating bank and credit linkages for SHGs, Mission Shakti provides training support to these groups for efficient fund management and bookkeeping. They also create market linkages by helping SHGs to market the products made by them. The state has over three million SHGs federated at village, panchayat, block, and district levels, managed and administered by a district Mission Shakti coordinator. Mission Shakti has fostered partnerships with many training and educational institutions to provide training on various aspects to SHGs. With organised support received from the government, SHGs have over the last two decades, evolved as 'social capital', involving activities beyond the economic spectra.¹⁰

Drawing on examples from using SHG platforms in Odisha Livelihood Mission and Mission Shakti, this paper discusses how ensuring financial autonomy through women collectives as an entry point village development exercise has been highly innovative in terms of empowering women to make life-determining decisions for themselves and their communities. Evidence from the field has found a positive correlation between increased women's agency and children's enrolment in schools, lower fertility, and better nutrition outcomes for the family. However, this paper argues that while women collectives are necessary, their collectivisation is certainly not sufficient to achieve women's empowerment. Interaction with SHG members during field visits show that lack of formal education, poor capabilities, weak communication, inter-personal skills, and negative family responses discourage women to proactively perform at group level. This paper will however, not be able to provide an exhaustive analysis on the functioning of SHGs in Odisha. Rather, it aims to demonstrate the limited capacity of the agency of SHGs, to alter practices and patriarchal norms that can further transform power relations between men and women to help establish a more gender equitable society.

SHGs: Social Capital to Induce Social Change

This section of the paper explores the growth of women's leadership towards women's empowerment through women's collectives in the context of Odisha, India. The focus will be to unpack the successful factors and consider how 'collective leadership' contributes to the process of impacting the attainment of social change at community level, linking to the achievement of development goals.

The literature on SHGs/women's collectives is replete with references to concepts like 'agency' and 'autonomy' of individual women's personal experience of empowerment. The existence of an ecosystem of women's collectives and their mentors as 'social capital' can support and sustain women's attempts to change their lives and resist power hierarchies and social inequalities.¹¹ Evidence suggests that

SHG platforms can empower poor women from low and middle-income countries financially, socially, and politically. Changes in self-perception, identity, and efficacy among women, particularly with reference to women's leadership, have been also established. There is an intricate relationship between these perceived changes in women who are members of collectives/SHGs and the emergence of women as 'natural leaders' from within. Development theorists suggest that the SHG represents the process by which 'social capital' as distinct from financial assets, access to land, and other resources has now become critical for development. The social capital theory advocates that women are stronger in bonding, and the SHG mechanisms are well-built among women. Women form an ecosystem that creates the possibilities, opportunities, and choices, to move towards transforming themselves and social structures.¹²

Secondary literature on SHGs in Odisha demonstrate that women's collectives have been successful in imbibing an entrepreneurial spirit into women by linking them to business activities and making cash available to them on hand. Most importantly, it has induced in women a 'habit to save'.¹³ Primary studies show that 'members agreed that their motives in joining SHGs were to save. Some said they joined the SHG to get credit to meet the unexpected cash demand for consumption and other purposes. Few opined that it led to social empowerment'.¹⁴ Field visits to remote villages and discussions with SHG members vindicate this statement when they say that access to loans, microfinance, and income generating activities through the group have reduced their dependence on hand-loans from neighbours, relatives, and most importantly from village money-lenders. Loans from moneylenders doubled the financial burden on the poor due to the high interest rates levied. Historical and literary evidence have demonstrated the degree and intensity of exploitation perpetuated by moneylenders amongst vulnerable communities, but specifically in remote tribal communities. Though the nature of exploitation has undergone change in recent times, subordination of poor communities continues to be a menace especially amongst migrant labourers, sharecroppers, agricultural workers, and the landless.¹⁵

Programme reports by Non-Governmental Organisations (NGO) partners from social experiments carried out through programmatic interventions by government, United Nations Childrens Fund (UNICEF), and NGOs in Sampurna Barta,¹⁶ Swabhiman,¹⁷ and Jiban Sampark¹⁸ programmes demonstrate that availability of cash and easy access to credit at lower rates of interest have increased families' confidence in the face of medical emergencies, and improved access to health facilities during pregnancy, and child birth. Both knowledge and peer pressure from other group members has led to positive health actions. There is an increased presence of women in village health and nutrition days, called 'Mamta Divas', in Odisha, and immunisation camps for both children

and pregnant women. Also, significantly larger numbers of antenatal checkups of pregnant women have been observed, and more women are demanding and accessing basic health services at health outreach camps and health institutions.¹⁹

These programmes have designed interventions to raise awareness surrounding health, nutrition, and sanitation amongst women through counselling and inter-personal communication sessions to foster individual and family level change in health, nutrition, and sanitation behaviours.¹⁹ Women leaders in SHGs have been specially trained on techniques of communication, counselling, and community mobilisation to support counselling sessions along with frontline workers like the Anganwadi worker and Accredited Social Health Activist (ASHA).²⁰

Midline studies and interaction with communities during field visits show that reiteration of messages and reaching out to women through women influencers and leaders have been impacted on, changing some highly risky traditional practices that are life threatening for both children and mothers. National surveys like Indian National Health Survey-4 and the Rapid Survey on Children and Comprehensive National Nutrition Survey (CNNS) support the claim that there has been significant reduction in infant mortality rates and measles, mumps, and rubella even in high burden states like Odisha. CNNS shows a steady reduction in malnutrition levels amongst women and children in Odisha, though there are areas of specific concern, such as stunting and high prevalence of anaemia, especially amongst children and women in the reproductive age group. National surveys give us little information on levels of knowledge and understanding of communities on social issues. However, monitoring reports submitted by civil society partners working on community mobilisation projects in Odisha show that SHG members influence health and nutrition behaviours of other women in communities by enhancing their understanding and knowledge. This further helps in changing practices of communities resulting in improved access to health and nutrition services. These significant improvements in access to institutional births, improved full immunisation rates, reduced levels of child marriages, and antenatal care is the result of improved knowledge and adoption of positive practices by families. These changes in many cases are mostly driven by using women from SHGs as community influencers.²²

Evidence from UNICEF-supported initiatives focusing on sanitation have also been declared as most effective change agents in implementing the community-led sanitation programmes.²³ UNICEF, in partnership with Mission Shakti Odisha, had also supported the SHG programme by providing funds and training to SHG members on establishing rural sanitary production centres to promote hygiene habits among rural women. While women-led rural sanitary production centres had limited success due to low demand for toilets in rural areas, linking

up SHGs for demand generation and use of toilets in rural Koraput, Rayagada, and other districts, showed encouraging results. Women in UNICEF's sanitation programmes have also been declared as most effective change agents in implementing the community-led sanitation programmes.²⁴

Women participation in SHGs show that 'psychological wellbeing is well addressed by joining SHGs compared to achieving economic and social objectives. The psychological aspects of members like self-confidence, literacy level, skill development and awareness on health and sanitation is enhanced'.²⁵ Similarly, a study conducted by an NGO, Pragati (with support from an international donor agency called Trocaire in 2012), in a tribal dominated district of Koraput confirms the claim made above that 'organizing women for savings and micro-credit, partnered with a community development perspective and approach was an important factor in elevating the socio-political and economic status of women at the household and community levels'.²⁶ A series of case studies mentioned in the study show that while participation by women in SHG activity was different for different groups, the common claim on improved savings habits, access to quick and easy credit from SHGs, and improved managerial skills amongst women resulted in women gaining more confidence to negotiate with family members on issues that directly concerned their wellbeing or the health of children.²⁷

Empirical evidence and analysis of secondary information shows that there are certain enabling factors for the success of SHGs across Odisha. First, the focus on poverty reduction, especially in poor women, has been one of the major reasons for receiving government and non-government patronage. In line with objectives of welfarist government strategies, women-focused development has been one of the most powerful mechanisms for state, as well as central governments. SHGs have therefore received special attention to realise government schemes. Second, SHGs have created an economic and political space for 'innovation and boldness of action'.²⁸ The focus on the participation of women in an organised manner has resulted not only improved economic activities between women but their collective strength has provided them the capacity to take action on a number of social issues that plague their immediate environment. It is well known that SHG members have waged the strongest protest against alcoholism—one of the major causes cited for domestic violence across the state—fighting against, and even destroying local breweries. Third, SHGs have enabled a sense of collective identity. Collectivising women in groups has provided a new strength to women through their bonding and comradeship, giving them a new identity. Registered and federated groups have names, dress codes, and uniforms to augment their identity in a community. This positive discipline also creates aspiration among other women to participate in group activities.

Fourthly, the location of SHGs within the village is advantageous, since this provides opportunities for women from all families to participate in group activities. This also helps in the establishment of homogenous groups with members from one social category to avoid discrimination and exploitation within group members. Finally, SHGs have led to mainstreaming women's issues. Having women come together in groups encourages the discussion of issues that affect and impact their lives directly. These groups also provide them with a channel to systematically articulate their concerns, which is one of the main reasons why the reorganisation of these group objectives discussed going beyond economic wellbeing and including social wellbeing as a principle of creating groups. Recent programme designs for SHGs therefore do not look at strict division of women's lives into economic, credit, and social circumstances, but discuss the inter-relatedness of these issues that affect women's lives.²⁹

Drawing on the examples from SHG-led programmes in Odisha, this paper argues that development using women collectives is viable as an alternative innovation in empowering women through equipping and allowing them to make life-determining decisions for themselves and their communities. The evidence from the field has found positive correlation between women's empowerment and children's education, the number of years spent in school, lower fertility, and better nutrition outcomes for the family. While women collectives can be a first step towards a concrete achievement in terms of women empowerment, they also face problems, such as these women lacking a formal education resulting in poor capabilities, weak communication and advocacy skills, and negative family responses which discourage women at the personal level.

Women's movements explicitly integrated gender into the conceptualisation of conscientisation and defined empowerment as rooted in fundamental shifts in power, privileges, control of resources, and agenda-setting.³⁰ Linda Mayoux underlined the complexity of the conceptualisation of empowerment as power relations that operate at various levels.³¹ Empowerment is about challenging and changing the status quo of unequal power relationships and its associated dynamics, which can then lead to transformational changes. Jo Rowlands discussed empowerment with four forms of power—namely 'power within', 'power with', 'power to', and 'power over'.³² Kabeer defines empowerment as 'the expansion in people's ability to make strategic life choices in a context where this ability was previously denied to them'.³³ Critical to this journey of empowerment is the value accorded to women's voice, agency, and agenda-setting power. Further, almost all conceptualisations of empowerment envisage transformations in individuals, in collectives, as well as in institutions, whether in formal or in informal domains. While

empowerment is about the process of transformation, it is also about the achievement of gender equality and the transformation of power relations.

Challenges of SHGs

Analysing the statement above, the discourse on challenges will consider the opposite argument that is gradually yet strongly positing itself in development space. It will look at how women perceive their 'empowerment' in the larger context of patriarchy, strongly entrenched in all social communities across the state. The analysis will therefore seek to map the decision-making capacities of women who form a part of these women SHGs through the existing tools available and largely used by gender theorists. Furthermore, there is an urgent need to assess whether SHG platforms serve as true representations of social capital or whether they are being further instrumentalised to achieve goals for social change, which the government finds challenging to achieve through its own institutions.

A recent study on Gender and Development Perspective to Practice by the State Institute For Rural Development and Panchayati Raj, Government of Odisha, compiled and analysed over thirty articles, showing that despite support from government institutions, gender equity and social justice—prerequisites for good governance—are difficult to achieve.³⁴ This is despite the commitment demonstrated from the government of Odisha which formulated the Odisha State Policy for Girls and Women in 2014 for the empowerment of girls and women to address gender issues. UN organisations such as the UN Population Fund, the UN Development Fund for Women, and UNICEF have been working closely with government departments and institutions to support implementation of legislations, policy, and programmes to support realisation of rights of women and girls in the state.³⁵

While SHGs have gone a long way in organising women into groups and harnessing their power as collectives, questions of whether these can attain gender equality and equity is a question that SHGs, as developmental bodies, have not been able to satisfactorily address. Women, both in the traditional and modern social structures, have always been the victims of greatest exploitation—poor women face the double burden; that of being a woman first, and then poor.³⁶ While SHGs have partially addressed the issue of poverty through providing some income-generating activities available for women, bringing women into collectives has not helped in reversing the patriarchal norms and patronising social practices that women suffer on a day-to-day basis. In fact, Wignaraja in his analysis states, 'even in sectors of economy in which women remain a dominant section of the labour force are those which demand low skills, repetitive functions and which generate low

returns'.³⁷ Interestingly, field observations continue to show the same trends even after women have been organised into groups, in that the income-generating activities that women continue to do as groups are making papad, pickles, eatables, and weaving. These activities are already done by women in traditional families as part of their routine job, except that in this instance they package and sell them through a market, supported by the government or an NGO. These income-generating activities do not require the acquisition of special skills, and therefore their social status does not largely alter or compare with that of the man who is regarded as the real breadwinner for the family.

SHGs has fostered a camaraderie among women to mobilise other women to access services and benefits of schemes provided by the government. These welfare schemes often do not require investment funds. On the contrary, they are largely free or conditional cash transfer schemes. Low cash-intensive actions have been well promoted, however our interactions with group members showed that decisions with regard to how the income was generated or the cash will be utilised at the individual family level when a woman accesses credit, are often taken by the man in the household. It was also seen that the money earned by virtue of being an SHG member was either invested in a family business, agriculture, or marriage of the daughter. In most cases, women said that they always had less say in matters of livelihoods, and finances irrespective of their membership in SHGs. While they felt proud to contribute to the family kitty, it was their husbands who made the decisions on how and what the money should be used for. Women often had to gain the consent of their husbands before they got money for their monthly deposits. The Pragati study in Koraput also brings to the fore a rather risky conclusion that not only mentions 'source of credit' as the major reason for joining these groups, but perceive that 'economic empowerment', if at all, is barely enough for their survival.³⁸ While women did not admit openly whether they were forced to take credit or loan facilities available to them as SHG members, cross examination and prolonged discussion showed that it was the family which decided when a member could access the credit facility. This goes against the basic objective of SHG formation, which considers social empowerment as a key consequence of collectivising women into groups.³⁹

S.M. Vijayanand, in his article, 'Institutions of the Poor and Panchayats' discusses two democratic experiments that were introduced in India around the early 1990's—panchayats⁴⁰ or three tier government system, and SHGs—as alternative approaches to reducing poverty.⁴¹ While panchayats were seen as a mechanism for democratic development, SHGs were seen as thrift and savings agencies. He argues that for real overall development to happen, the two systems of SHGs and panchayats should work in partnership and synergistically. Citing the example of Kudumshree in the state of Kerala, he argues that unlike in others

states of India, a close functional relationship between panchayats and SHGs has proven to be the trump card for strong and vibrant SHGs and panchayats. It is only in Kerala that SHGs have achieved the state where they operate with five capitals—social, physical, financial, green, and human resource. But the realisation of rights does not come only with the five capitals mentioned. There is a need to have civic and political capital too. Civic capital focuses on freedom to act as citizens, while political capital refers to having a decisive say in the allocation and use of resources. Civic and political capital are best realised through strengthened three tier governance mechanisms. The combination of SHGs and panchayats is not a coincidence, but rather a design in achieving the fundamental rights of each person. He further suggests ‘that community driven development was seen as more realistic compared with local government led development. Self-help came to be preferred to state provided welfare ignoring structural constraints, political, economic and social which perpetuated poverty’.⁴² Interestingly, many arguments show that bureaucracy and administration preferred SHGs as a development-model since SHGs were less threatening to power relationships in a developing state.⁴³

This argument is supported by other theories too. Wignaraja argues that in societies where men dominate women, recourse to any action that focuses on issues common to both women and men will likely undermine the issues that relate to women specifically.⁴⁴ This is evident in an experiment of SHGs where, if merely seen as an easy option to access credit for families in distress, the focus is diverted from issues of women, to family issues, and thus leaves little space for women to demand and realise their own rights. Second, it was observed that only in instances where participatory rural appraisals were carried out identifying the needs of women, the economic activities were largely directed by the administrative system. Our field observations are vindicated by his observations that SHGs still operate within the conventional top-down models for development where the poor are treated as objects of change and the relationship between the intervenor and the poor often takes the form of a subject acting upon an object.⁴⁵

The above observation brings us to the larger question of participation in SHGs as a measure to reverse larger power relations between men and women. Field interactions with members from our programme areas clearly demonstrate that contribution to the family kitty is a main reason behind participation of women in SHGs. This in itself is not a problem until one turns to the question of whether the woman has a say in utilising some amount of her earnings in areas that she deems fit. But more importantly, the woman herself does not perceive this incapacity to take decisions about her money as an individual threat. She thinks it is ‘proper’ that her husband takes the decision on behalf of her and her family because he ‘ought’ to.⁴⁶

As member of a SHG group, a woman feels comfortable and within the 'accepted social frame' in an advisory role even when she mobilises her peers to take an action. It is observed that SHG members are able to easily take on the roles of advisors and provide peer support to other members. This peer support, however, is limited to mobilising women to access benefits from government health and nutrition schemes. It is important to note that the schemes mostly talked about are welfare-related and do not require major financial investment from the side of beneficiary. However, there is caution exercised when there is a need to support on matters that threaten to disrupt strongly-rooted social or patriarchal norms. For example, many communities in Odisha support and promote child marriage, especially amongst girls. These practices are dictated by traditions, and non-adherence may attract community wrath and ostracisation. These are matters that SHG members cautiously and decisively veer away from. Women are often seen to quote traditions and culture as reasons for not interfering on issues such as early marriage, or they would often quote decisions of marriage as an internal family matter that requires action from within the family and not without. Thus, peer-support is acceptable, but influencing the larger spectrum of issues in communities is still not perceived as achievable by members themselves because SHG members believe and adhere to the same patriarchal norms that they are expected to reverse. Launching basic social and structural change would require the women to first detach themselves from their social space and have a bird's eye view of the oppressive structures and systems that they live in and accept as part of their daily lives. This requires special skills such as negotiation and other life skills that go beyond basic managerial and economic skills.⁴⁷

It is interesting to note that despite being contributors into the family income kitty, the time poverty⁴⁸ of women has not substantially reduced. A member's attendance of SHGs meetings, becoming more aware, providing peer support, working alongside frontline functionaries, and providing for timely loans, does not necessarily reduce her work burden in the house—cooking, fetching water, looking after children, and engaging in family agricultural activities. Gender activists have often questioned whether becoming instrumental in financial contributions to the household, reduced or increased the burden of women in our society.

One critical change that SHGs have introduced into societies is in encouraging the collective identity of women. However, this collective identity does not necessarily give an individual woman the confidence to fight for her rights at the family level or provide her with her 'social and individual space'.⁴⁹ Experiments like joint-land ownership and joint titling of land have paved the way for social change, but are still not adequate to alter the social status of women in Odisha.

This paper has analysed women SHGs as a potential trajectory to achieving gender equity in an inequitable society with persisting male dominance. With the Kerala example, it is evident that Odisha can adopt similar measures to strengthen women SHGs to function not only as thrift and credit agencies but as a mechanism for social change and development. This requires providing special skills to women SHGs, and instilling confidence into women to perceive themselves as potential social change-makers by building their confidence and self-esteem. It also requires a fully-fledged analysis of individual and collective rights, and support in identifying the right actions to dent power-relations between men and women. With their potential, it is possible to mainstream and increase gender discourse around gender equality and equity to establish an equitable society. This may also require intensive engagement with other community-level institutions with male memberships, like village-level development committees and farmers committees, to understand the equality discourse.

Development requires close functional relationships between panchayats and SHGs as partners in development. This would foster the strength of both institutions in pursuing a desirable development framework. This requires the strong participation of women and men in the process of identifying the needs and pillars to establish a equal society and polity.

The most important action is the capacity building of all administrative, political, and community systems on gender theories so that they are able to provide adequate and appropriate direction and support to SHGs in their day-to-day functioning. Since the Government of Odisha has demonstrated a strong commitment to women's development through a Girls and Women's Policy, Gender Budget, and strong participation of SHGs in Mission Shakti and Odisha Livelihood Mission in livelihood and electoral processes, it is not impossible to generate a newer debate around gender equality systematically.

Notes

1 Ponna Wignaraja, *Women Poverty and Resources* (New Delhi: Sage Publications, 1990).

2 Ibid., 23.

3 Ibid., 65-88.

4 Benudhar Rout and NT Sahu, 'Women Participation in Rural Local Self Governance in Odisha: A Constitutional and Reservational Perspective,' *Odisha Review* Vol.LXVIII, no. 7/8 (Feb- March 2012): 55-64.

- 5 'Report on Functioning of Women Self Help Group in Orissa,' Prepared by The Organization for Women and Rural Development, (TOWARD) Bhubaneswar, Orissa. (2012) ncwapps.nic.in.>pdfReprts
- 6 Narender Kande, 'The Self-Help Groups Movement in India,' *Impatient Optimists*, Bill and Melinda Gates Foundation, (2015). www.impatientoptimists.org
- 7 Ibid., 16.
- 8 Ibid., 16.
- 9 Ibid., 26. The general category in India refers to as a social group of people who belong to forward castes in the caste hierarchy or are from economically higher sections.
- 10 Partner Reports submitted to UNICEF Odisha and programme monitoring visits show that SHGs have evolved into a strong network of groups that give them a shared identity and shared strength to influence social systems.
- 11 A. Malhotra and S. R. Schuler, 'Women's empowerment as a variable in international development. Measuring empowerment: Cross-disciplinary perspectives,' 1, no. 1 (2005): 71-88.
- 12 Ibid., 71-88.
- 13 Abhijit Mohanty and Satya Prakash Mishra, 'Self-Help Groups and Women Empowerment – A Study of Khordha District in Odisha,' *International Journal of Engineering Research & Technology* 7, no. 6 (June 2018): 363.
- 14 Ibid., 365.
- 15 Sanjoy Patnaik, 'Why Restrictions on renting agricultural land in India must go,' *Scroll.in*, June 10, 2016, accessed June 10, 2020, <https://scroll.in/article/808594/why-restrictions-on-renting-agricultural-land-must-go>
- 16 Sampurna Barta, meaning 'complete dialogue', is a convergent community mobilisation intervention that aims to raise knowledge and understanding of issues communities face, especially amongst the most vulnerable tribal communities on child survival and to mobilise them to take simple actions that could positively impact infant, child, and maternal survival rates. This supports the initiative of the State Strategy for Accelerated Reduction of Maternal and Child Mortality (SAMPURNA) in Odisha, launched by the Department of Health and Family Welfare and the Government of Odisha.
- 17 An intensive community mobilisation experiment that uses the agency of women SHGs to support improvement of maternal nutrition amongst women, especially the poorest women. This is carried out in partnership in Odisha with the Livelihoods Mission, the Panchayati Raj Department, and the Government of Odisha.
- 18 Jiban Sampark, an intensive community mobilisation programme on child survival carried out in particularly vulnerable tribal groups (PVTGs) in Odisha. Anchored in the Department of Women and Child Development, Government of Odisha the programme is carried out in partnership with the Departments

of Panchayati Raj and Scheduled Caste and Scheduled Tribes, Government of Odisha GoO.

19 'Endline Survey: Maternal and Child Health Projects in LWE Affected Areas of Koraput and Malkangiri Districts,' District Project Management Unit (DPMU), Koraput submitted to UNICEF, 2017, Unpublished Internal Reports.

20 The field work is primarily carried in programme areas of UNICEF in districts of Koraput, Rayagada, Kalahandi, Malkangiri, Nabarangpur, and Kandhamal; all of which have very low development indicators and have been identified as aspirational districts under Niti Ayog of the Government of India.

21 Partner Reports submitted to UNICEF Odisha, 2019, Unpublished Internal Reports.

22 Endline Survey, 2017.

23 UNICEF, Odisha document on Self Help Groups as behaviour change agents for Sanitation, Koraput (Odisha: UNICEF, 2014), Unpublished Internal Reports.

24 UNICEF, Odisha document on Self Help Groups as behaviour change agents for Sanitation, Koraput (Bhubaneswar, UNICEF -Odisha, 2014), Unpublished Internal Reports.

25 Mohanty and Mishra, 'Self-Help Groups and Women Empowerment,' 365.

26 Nancy Endrinal Parreño, Luna Panda, and Subhasri Kumari Subudhi, *Self Help Groups and Women's Empowerment – The Pragati Koraput Experience* (Koraput, Odisha: Pragati, Koraput, 2012).

27 Ibid.

28 Anuradha Mohanty, 'Transcending Barriers, Transforming Lives,' in *Gender and Development*, ed. Manas Ranjan Debata (Bhubaneswar: State Institute of Rural Development & Panchayati Raj, Government of Odisha, 2018), 128 -138. She mentions that after they marked remarkable changes in the realm of their socio-economic empowerment after women were organized into SHGs. They pioneered activities like anti-liquor movement and girls' education. A similar story was reiterated by Kamala Khara, a very articulate tribal leader of Shivani-Two SHG in Padampur GP of Koraput District.

29 Mission Statement, Mission Shakti Programme, Government of Odisha; Mohanty, 'Transcending Barriers, Transforming Lives,' 129-136.

30 Batliwala Srilatha, *Engaging with Empowerment: An Intellectual and Experiential Journey* (New Dehli: Women Unlimited, 2013).

31 Linda Mayoux, *Micro-finance and the Empowerment of Women: A Review of the Key Issues* (Geneva: International Labor Organization, 2000).

32 Jo Rowlands, 'The Right to be Heard: An Overview,' in *Speaking Out*, ed. Nikki van der Gaag and Jo Rowlands (Bourton on Dunsmore: Practical Action Publishing Ltd, 2009), 1-10.; Jo Rowlands, *Questioning Empowerment: Working with Women in Honduras* (Oxford: Oxfam, 1997).

33 Naila Kabeer, 'Resources, Agency, Achievement: Reflections on the

Measurement of Women's Empowerment,' *Development and Change* 30, no. 3 (July 1999), 435 – 464.

34 Manas Ranjan Debata, *Gender and Development Perspective to Practice* (State Institute for Rural Development and Panchayati Raj, Government of Odisha, 2018).

35 UNICEF Odisha, 'Annual Work Plan, 2018 -2019'. Unpublished Internal Document Signed with Government of Odisha for implementation.

36 Wignaraja, *Women Poverty and Resources*, 20.

37 Ibid.

38 Parreño, Panda, and Subudhi, *Self Help Groups and Women's Empowerment*.

39 Ibid.

40 Panchayati Raj system refers to local self-government of villages. Formalised by the 73rd amendment to the constitution it is part of the three-tier governance mechanism in India.

41 Parreño et al, 1-12; Debata, *Gender and Development*.

42 Ibid.

43 S. M. Viajayananda, 'Institutions of the Poor and Panchayats,' in *Gender and Development*, ed. Manas Ranjan Debata.

44 Wignaraja, *Women Poverty and Resources*, 1-38.

45 Ibid., 123.

46 Sampurna Barta Project Reports submitted to UNICEF and interviews held with Naranga Pujari Secretary of Bondaguda Mahila Mandal, Bondaguda village, Khudi GP, Semiliguda Block, Koraput, 2018 support the claim that women think men ought to take all decisions regarding money at home', Unpublished Internal Reports.

47 Partner Reports submitted to UNICEF, 2019, Unpublished Internal Reports.

48 Refers to lack of time at a woman's discretion after completing her committed activities at home and as a member of the group to do something for herself.

49 Focus Group Discussions held with SHG groups in project areas.

THE GENDERED EDUCATIONAL APPARATUS IN KENYA: IMPLICATIONS OF A RISE IN NEO-LIBERAL EDUCATION & FEMINISED LABOUR

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Abstract

This paper attempts to understand how gender roles run through the fabric of Kenya's educational apparatus. For the purposes of this paper, the educational apparatus refers to any formalised schooling that is supported ideologically by the state, or more specifically, the public school system and the policy regulating it. How do rising rates of formalised education impact gendered labour expectations? Rural Kenya is a region experiencing a rise in formalised education, making it a fitting one for exploring questions about the malleability of gendered labour expectations. In the case of Kenya, formalised education tends to be carried out in ways that reinforce pillars of a neoliberal state. This can have both empowering and disempowering impacts for women in the domestic sphere. Three months of participatory fieldwork in Samburu and Laikipia Counties in Kenya suggest that rising rates of education increase women's capacity for income earning and community decision-making, which gives them more autonomy in deciding how their time is used. Conversely, a monetised education system requiring school fees reinforces conceptions of a male breadwinner due to gendered labour markets, and educational curricula can reinforce gendered behaviours in ways that subordinate women. Interview data suggests that although formalised education may increase women's income earning capacity, this does not translate to a more equitable sharing of feminised labour responsibilities between husband and wife in the domestic sphere. The incongruency of findings supports the idea that processes of socio-political change can be fraught with tension, reinforce or challenge power hierarchies, and/or act as emancipatory forces, sometimes all at once.

Introduction

Scholarship suggests that changing socio-political circumstances can shift gender norms and gendered labour expectations. Rural Kenya is a region experiencing a juncture of various socio-political changes, making it a fitting case for exploring questions about the malleability of gendered labour expectations. This paper explores rising rates of formalised educa-

Laurence LeBlanc, "The Gendered Educational Apparatus in Kenya: Implications of a Rise in Neoliberal Education & Feminised Labour," *St Antony's International Review* 16 no. 1 (2020): 49-73.

tion for women in rural Kenya and its impacts for gendered labour. How do rising rates of formalised education contribute to gendered labour expectations? This paper answers this question by drawing on interviews conducted during a three-month period in 2019 with Maa-speaking Maa-sai and Samburu pastoralists in Laikipia and Samburu Counties, Kenya [see *appendix A, maps and appendix B, fieldwork sites*]. Interview data suggests that the state is deeply embedded in the domestic sphere through a neoliberal educational apparatus that in some cases empowers women in pastoralist homes, and in others reinforces gendered hierarchies. Studying educational systems is important in understanding gendered labour divides, which can provide insight into gender inequalities.

Definitions serve to clarify confusion. 'Gendered labour responsibilities' refers to divides in labour expectations between what is traditionally considered 'feminised work' and what is traditionally considered 'masculinised work'. Gendered labour divisions are reliant on the feminised 'woman as reproducer' and masculinised 'man as provider' gender roles embedded in economic logic, as well as in society's entrenched attitudes across various geographical spheres.¹ Scholars have shown that expectations of feminised labour are socially constructed, and evolve and change over time.² This is due in part to changing socio-political circumstances, such as increased rates of formalised education. Formalised education is a fitting way of investigating how gender relations are constructed and reconstructed at multiple levels of analysis since it is influenced by both bottom-up cultural norms and top-down state regulation.³

In the case of Kenya, formalised education tends to be carried out in ways that reinforce pillars of a neoliberal state.⁴ This paper defines a 'neoliberal state' as one which supports the creation of markets and favours deregulation, privatisation, and limited government intervention, even in the educational sphere.⁵ The Kenyan state fits this description because it is an ideological vehicle through which capitalist forces are prioritised.⁶ This logic extends to its educational apparatus as seen in, for example, school fees. Reuben Mutegi et al. suggest that in the context of Kenya, the burden of educating children is born 'disproportionately more by households than by governments'.⁷ Although technically primary education in Kenya is freely provided, 96% of the state budget goes towards recurrent expenditures (e.g., paying teachers' salaries),⁸ which leaves other educational costs for communities to bear. Additionally, much of the capital expenditure in Kenya comes from overseas development aid. It is therefore significant that Kenyan parents pay an average of 65% of the cost of primary education.⁹ As another example of Kenya's monetised school system, Ibrahim Oanda suggests that the increased privatisation of universities in Kenya is evidence of how the Kenyan state's educational system relies on neoliberal market logic, in which private education, accessible to few, is of better quality than public education that is accessible to many.¹⁰ The educational apparatus can reinforce global neoliberal eco-

nomics and normalise gendered socialisation processes learned at home, perhaps especially so when these forces benefit the state's socio-political aims.¹¹

Data used in this paper are primarily based on interviews conducted in the summer of 2019 with Kenyan pastoralists and interpreted through a feminist political economy lens. 'Pastoralism' is a livelihood strategy based on livestock rearing and grazing, and traditionally, nomadism. 'Pastoralists' are the traditionally nomadic people who live from pastoralism. This paper considers the Samburu pastoralists from Samburu County and the Maasai pastoralists from Laikipia County as part of larger Maa-speaking or Maasai society, as do Roy Larick¹² and Jon Holtzman.¹³ The Samburu and Maasai share many of the same cultural traditions, including rite of passage ceremonies, traditional ways of socialisation, and extended family systems.¹⁴ For this reason, this research focuses on Maa-speaking pastoralists who identify as either Samburu or Maasai and who reside in either Samburu or Laikipia Counties in North-Central Kenya.

Rising rates of education in rural Kenya appear to result in increased income-earning and community decision-making for women, which gives them more autonomy in deciding how their time is used. Although this could be said to be a form of empowerment, this paper urges researchers to be wary of romanticising increased neoliberal education as a simple solution to gendered labour inequalities. Interviews suggest that home-related labour continues to be feminised, unpaid, and often understood as less valuable than masculinised work. Kenya's monetised education system reinforces conceptions of a male breadwinner, and educational curriculum¹⁵ can reinforce gendered behaviours in ways that support a neoliberal economic system that subordinates women's unpaid labour.¹⁶

There is a methodological gap in our understanding of how gendered labour and education are linked. Studies show that in Kenya, girls have lower grades,¹⁷ less academic participation,¹⁸ and higher dropout rates than boys.¹⁸ Is this because of gendered labour divisions at school? Or is it the pre-existing gendered divisions of labour within the home that lead to these results? Since it is very difficult to establish causality, this paper does not aim to answer these questions, yet there is value in conceiving of this relationship as bi-directional.

Understanding how gendered labour responsibilities are shifting or remaining stagnant offers clues into understanding women's subordination,ⁱ especially when unravelling gendered labour assumptions. Across Kenya, women work nearly thirty-three percent more hours than adult men in all tasks put together, which is consistent with time-use surveys conducted in other parts of East Africa.²⁰ This paper does not want to suggest that ridding Kenyan society of gendered labour

i When referring to women facing systematic barriers because of their gender,

responsibilities is the end goal, or even desirable, as there are often practical reasons why men perform some kinds of labour and women others. The problem is that patriarchal assumptions associated with neoliberal market logic value men's responsibilities more, both socially and economically speaking, and make invisible the importance of feminised domestic, family, and sexual labour.²¹ The issue is not that the neoliberal state prioritises paid work through a monetised educational apparatus, but rather that paid and unpaid work is unevenly distributed within the home, which the educational apparatus does not address directly. By neutralising gendered labour responsibilities, the educational apparatus disadvantages women in their educational pursuits.

Theoretical Framework

In many East African societies, and across the larger international arena, men and women's labour responsibilities operate according to social customs, traditions,ⁱⁱ and social roles which create 'masculine' and 'feminine' labour expectations both within and outside of the household.²² Like other pastoralist groups in Kenya,²³ Maa-speaking pastoralists adhere to gendered labour expectations at the household and community levels.²⁴ At the micro level of the home, this means that women are expected to fulfil certain 'womanly' roles, and men, 'manly' roles. These roles differ depending on the local context in question, according to different processes of socialisation.ⁱⁱⁱ Sultana argues that gendered divisions of labour in the home sphere facilitate the operation of patriarchal socialisation processes by which men can control women's work.²⁵ 'Patriarchy' refers to the way gender relations operate on multiple levels, often privileging an androcentric perspective and its interests.²⁶ Beyond micro considerations of patriarchal domination in the private household, the term can be used in a more structural, macro way. Since patriarchy can be elaborated by means of social domination, economic domination, or political domination, 'patriarchy describes the institutionalised system of male dominance' more broadly speaking.²⁷ This said, patriarchy also imposes expectations of gender that are harmful to men, which Mary Amuyunzu-Nyamongo discusses in the Kenyan context, including

this work borrows the term 'subordination' from Carole Pateman (1988) and Abeda Sultana (2008) instead of 'exploitation', as the latter suggests powerlessness and victimhood, which removes women's agency.

ii This paper refutes the notion that tradition is a linear, non-contradictory progression from one point to a 'modern' point, and also refutes that tradition is implicitly 'backwards' as presented in post-war modernisation theories of development.

iii As Boserup and others have pointed out, what is considered to be women's or men's work outside the home varies considerably between countries and regions. This also changes with imperialism, a force that can change definitions of tradition and what is associated with women's work.

hypermasculine beliefs about non-emotional behaviour.²⁸ Despite the limitations of the term 'patriarchy', I defend its use to refer to a broader definition of structurally imposed, but contestable, power dynamics reflecting male-centric interests.

A macro, political economy lens is appropriate in understanding gendered labour responsibilities and how they are shifting. This paper uses a feminist political economy lens which assumes that the mainstream political and economic forces that structure household relationships reflect the privileging of masculine narratives on a larger geopolitical level.²⁹ As Ester Boserup explains, gendered labour responsibilities within the home do not develop in a vacuum, 'or merely as a consequence of differences in physical strength and biological functions between the sexes'.³⁰ In other words, gendered divisions of labour are upheld by structural factors.³¹ In her book, *Women Forget Men are the Masters*, Margerethe Silberschmidt discusses gender antagonism and socioeconomic change in Kisii District, Kenya, suggesting that divisions of labour create hierarchies wherein men are superior to women.³² International political economy is a useful lens through which to understand how hegemonic gender roles come into being, and how gender hierarchies within homes are supported by larger institutions.

An international political economy lens is valuable for understanding gendered labour responsibilities in Kenya because structures of systematic gender hierarchies can shape agents and their actions. These hierarchies privilege certain masculine forms of knowledge creation and somewhat limit the possibilities of conceiving new, widespread social dynamics which place gender equality at the centre of political goals. 'International political economy' is a field of study concerned with the overlap between politics, economics, and international relations. Jacky True considers how discussions of gender domination in international relations often omit the domestic sphere as a unit of analysis.³³ This paper suggests that the home cannot be removed from the larger structural power dynamics negotiated at other levels of analysis.

This introduces us to the public/private divide, an 'ideological division of life into apparently opposing spheres of public and private activities, and public and private responsibilities'.³⁴ Feminist political economy scholars have challenged this divide by revealing the consolidation of institutionalised, patriarchal norms in imperial policy,³⁵ marriage,³⁶ economics,³⁷ citizenship rights,³⁸ and war.³⁹ In short, the home has geopolitical significance because it acts as a micro-level where power relations play out. In Kenya and across the globe, women systematically face more barriers than men in accessing education, attaining financial independence, and altering systemic inequalities. Suggesting that this is a 'private' issue obscures the extent to which the public and private are intertwined. Therefore, this paper agrees with the notion that the division between these spheres is largely fictive.

Although states are often conceived of as neutral in the domestic sphere, feminist international relations scholarship challenges this notion⁴⁰ and ties domestic labour responsibilities to larger educationally instituted forms of gendered domination.⁴¹ In their book, *Revisiting Gendered States*, authors Swati Parashar et al. demonstrate how the state is conceived of as a rational actor even when it is structured by deeply gendered institutions and assumptions.⁴² This is echoed in Charlotte Hooper's book, *Manly States*, which draws a relationship between masculinity and state power.⁴³ In this way, states are socialised imaginings very much influenced by 'cultural' norms, yet with the authority that statehood asserts. Accepting states as value-less, rational entities enables the state to enter the home sphere in neutralised ways, when in reality the state reasserts its power by constructing the domestic sphere.⁴⁴ In accordance with True and Parashar, this paper assumes that states are not neutral, but that they are engaged in actively reinforcing power structures that reflect their interests. One way of doing so is through an educational apparatus that renders gendered labour responsibilities invisible.

Methodology

Interviews with individuals can highlight some of the tensions in constructions of gender, revealing the messy logic behind gendered expectations found in the home sphere. The data being drawn from in this paper is twofold, namely (1) formal fieldwork transcripts completed under McGill's Institutional Canopy of Conservation (ICAN), and (2) three months of ethnographic fieldwork in Samburu and Laikipia in 2019 facilitated by the Indigenous Movement for Peace Advancement and Conflict Transformation (IMPACT). Both the formal interview transcripts and the informal conversations reflected on during ethnographic fieldwork offer insight into changing gender relations in pastoralist communities.

As a Caucasian, North-American researcher, my positionality evokes inherent interstices in interpretation of interview transcripts. As a beneficiary of globally imposed race- and class-based hierarchies, it is not my place to prescribe solutions in contexts I am not innately familiar with. I cannot normatively critique the actions of those oppressed by structures because it would undermine the agency of these groups. Through repeated evaluation of my assumptions, I have interrogated my arguments and worked to understand and apply Kenyan racial discourses. Working with Kenyan-led community organisations has influenced my analysis and informed my academic training with a broader worldview. Still, this analysis should be considered a partial interpretation of complex phenomena.

Formal interview transcripts were facilitated by the Institutional Canopy of Conservation (ICAN), a joint research project led by the African Conservation Centre (ACC) and McGill University. ICAN

studies a range of conservancy experiments concerning local livelihoods and natural resource practices in East Africa. ICAN's goal is to identify successful community conservation projects with the end of promoting biodiversity and supporting local livelihoods through income diversification and rights to natural resources. Working in the summer of 2019 under the supervision of Professor John Galaty and Professor Jacques Pollini, I conducted formal interviews with locals from Kirimon, Loogorate, and Naibor Keju communities in Kenya's Samburu County [see *appendix A: maps*]. The goal of these interviews was to produce an ICAN scoping study for the region of Samburu West with regards to changing land tenure systems and governance strategies. Interviews took place based on availability sampling and were recorded with the permission of interview participants. Additional interviewees were recruited using a snowball sampling strategy to delve deeper into key issues. A local translator translated answers from Swahili to English when necessary. Local assistants were helpful when it came to selecting interview participants to be as least disruptive as possible [see *appendix B, fieldwork sites*]. Each interview generally lasted between thirty minutes to one hour at the interviewee's home.

As a primary researcher on the ICAN team, I independently conducted twelve formal interviews, jointly conducted seven more, and transcribed those of the whole team [see *appendix C, list of interviews*]. An inductive coding method was used to categorise interview segments into relevant, workable categories. Some of these categories included: 'gender relations', 'wildlife-human conflict', 'governance', 'education', 'healthcare', 'land tenure rights', 'history', and 'climate change'. Within the gender relations category, sub-categorisations included: 'husband-wife relationships', 'labour responsibilities', 'childcare', 'pregnancy', 'women's groups', 'youth marriage', 'masculinity', 'domestic abuse', and 'cultural norms'. Throughout the interview and coding processes, it became clear that gender relations were structuring principles for the Samburu and Maasai. Specifically, interviewees suggested that gender relations influenced larger community-wide decision-making about land and other resources, dictated how labour was divided, and governed what happened within the home sphere. The formal fieldwork transcripts are consulted with throughout this paper. For reasons related to McGill University's Research Ethics Board approval, these interview transcripts are not included in the appendix but can be requested by contacting McGill's branch of the Institutional Canopy of Conservation (ICAN).

As for informal interviews, working as a research intern with the Indigenous Movement for Peace Advancement and Conflict Transformation (IMPACT) provided opportunities to engage with pastoralists in multiple Counties in North-Central Kenya. This human rights organisation works at the intersection of conservation, policy action, and pastoralist livelihoods to ensure equitable, conflict-free land use in Northern

Kenya. I lived in Nanyuki, Kenya completing this research internship from May to July of 2019. As time progressed, I became increasingly interested in gendered labour responsibilities in East Africa, and how this was related to land ownership and livelihood strategies. This topic was relevant when discussing community land demarcation, climate induced insecurities, and local governance strategies.

IMPACT opportunities included participating in field research pursuits, interviewing community members about land demarcation in Samburu County, visiting women's groups and learning about grassroots strategies for gender equality, and attending community land council meetings. This work engages with the informal interviews and notes taken after conversations with interviewees. McGill University's Research Ethics Board recommended drawing from these notes without disclosing the notes themselves to protect the privacy of interviewees.^{iv}

This work aims to recognise the divergent experiences of those echoed in interviews without suggesting their situated knowledge(s) offer empirical truths. Opinions are not homogeneous, so the most comprehensive understanding comes from taking interview transcripts collectively, as interviewees cannot speak for their entire communities. As a researcher, I do not want to essentialise or tokenise points of view and wish to avoid claiming that one truth is more valuable than another. An epistemology that reproduces, rather than is critical of, points of view is perhaps not that feminist after all. For this reason, this paper draws from other scholarly findings to contextualise local interviewee opinions.

Interview transcripts are coded through a letter-number combination for straightforward, non-identifiable citing [*see appendix C, list of interviews*]. Interviews conducted by myself begin with the letter 'L,' followed by the number of the interview (for example, 'L2' refers to the second interview I conducted during fieldwork). One case is coded as 'LS#', signifying that it was an interview jointly conducted by myself and another McGill University colleague, Sasha Masabanda. The informal conversations which took place during the ethnographic component of research are similarly coded as 'L#', as they were also conducted by myself. Unlike the formal interviews, the informal conversations sometimes involved multiple conversations with the same person. The coding system keeps the same '#' when discussing conversations with the same person, even if the conversation spanned time, space, and topics.

Finally, this paper works from a set of simplifying assumptions for reasons concerned with clarity and scope. Although the tradition of objectivity is problematic, grouping experiences together to form a partial reality is sometimes necessary to make broader generalisations. The work simplifies categorisations of 'women' and 'men', assuming the gender of respondents corresponds to their female and male gender

iv This research is approved under the McGill University Research Ethics Board #19-11-016.

presentations. Although this may be rigid, this paper makes such categorisations with the understanding that it is simplifying. Although as a researcher I showed interest in learning about gender malleability in rural Kenya, interviewees adhered to a strict gender binary defined by biological differences in sex.

Context

This section reflects on the position of women and girls in Kenya with regards to education and feminised labour in order to provide context before discussing findings. Feminised labour responsibilities in the home space can be divided into three sub-categorisations of feminised labour, namely domestic, family, and sexual labour. The construction of 'womanhood' is closely tied to these three spheres of feminised labour expectations, as they link to unpaid labour, motherhood, and sexual duties.

The first category of gendered labour can be broadly referred to as domestic labour. Domestic labour refers to traditional homemaking chores associated with the domestic sphere. Typically, for Kenyan pastoralists, women are responsible for all domestic responsibilities at their *boma*, or traditional Maasai home, whereas men are primarily responsible for taking care of livestock and making decisions. Kenya-specific studies have shown that female children take more time completing domestic duties than male children, which is negatively related to school performance.⁴⁵ Onderi Justus, from the University of Nairobi, studied the influence of domestic labour and home expectations on the performance of female primary schoolchildren in Gucha District, Kenya. This study concluded that the time girls spent engaged in domestic labour impeded school performance and participation, negatively impacting their prospects for future education.⁴⁶

Beyond domestic labour, gendered labour can also be discussed with regards to family labour. Family labour refers to the caretaking role generally associated with motherhood. Although cooking and cleaning responsibilities, part of domestic labour, are related to family caretaking, family responsibilities extend beyond domestic work. Family labour is concerned with what some scholars have labelled 'emotional labour'.⁴⁷ This relates to education because girl children are expected to help their mothers with childrearing responsibilities, such as taking care of younger siblings.⁴⁸ Beyond their own homes, young girls can be contracted out to help with other family labour, such as washing clothing or building houses, preventing them from accessing educational opportunities.

Our third codified kind of gendered labour, sexual labour, encompasses the various sexual expectations placed on women. These include women's 'biological' childbearing responsibilities, often decided and enforced by men, and women's expected role as the provider of

sexual pleasure for their husbands. Women are expected to start their own families at a younger age than men.⁴⁹ Judith Shabaya found that early marriage contributed to higher dropout rates for girls in primary and secondary schools in Africa.⁵⁰ Additionally, Molly Warrington interviewed 24 girls from four schools in Kajiado district, Kenya, and two-thirds of them discussed 'harassment, violence or threats of violence from parents, teachers or male members of the community' without being asked about it directly.⁵¹ Without a sexual education curriculum, the Kenyan educational apparatus cannot address these worrying statistics.

Feminised labour responsibilities construct 'womanhood' for two reasons. Firstly, they tie women to the home sphere and reinforce the imagined homebound mother figure. Secondly, domestic labour responsibilities intensify women's subjugation to their husbands with regards to time use. Gendered divisions of labour impose domestic, family, and sexual responsibilities on women. These are culturally and institutionally reinforced.⁵²

Findings

This section first lays out the ways through which Kenya's educational apparatus is, in the words of interviewees, 'empowering' women in the household, through providing income earning tools and increased decision-making capabilities. Secondly, this section describes some of the limitations to Kenya's educational apparatus as an empowerment tool, as analysis of the interviews suggests this same educational apparatus may be reinforcing gendered hierarchies by reinforcing women's subordinated position in the domestic sphere.

All in all, interviewees understood education as a necessary change for the Samburu and Maasai pastoralists. One father of four girls and one boy proudly told us about how all of his children were on route to university, the eldest of whom had already graduated (I3). He had high hopes that increased formal education would improve local infrastructural projects, including irrigation systems, as his community became more sedentary, privatised, and less nomadic (I3). Multiple parents noted that their children's education is beneficial for them because educated youth are more likely to find jobs, which can help parents (L1). One woman elder pointed to a vehicle outside her home and noted that if her son had not gone to school, she would not have had access to a vehicle for faraway meetings (L9). Therefore, the general consensus was that formalised education was a positive change for the pastoralist lifestyle. Furthermore, both men and women interviewees in Samburu were overwhelmingly supportive of a rise in formalised education as a way of empowering women. This support was multi-generational, as both elders (L9 and I3) and youth alike (L13) were adamant about the benefits of education for women.

Interviewees suggested that higher female enrolment in school is shifting gender relations within the home. Today, Samburu girls are allowed to go to school in Samburu West, which was not the case not long ago (L1, L4, L8, L11, and L13). One man suggested that since he was educated, he learned to respect his wife and her intelligence, which, in his opinion, differed from how his parents demonstrated oppressive husband/submissive wife household gender relations (L4). One interviewee suggested that because girl children are in school, boys and girls were now learning that both genders are capable of making decisions and sharing responsibilities (L1).

There is 'increased differentiation' between educated and uneducated members of communities.⁵³ Translators constantly made distinctions between the educated and uneducated ways of seeing things in the community (L13). Community members suggested that 'learned' and 'unlearned' youth had differences in opinion about household responsibilities (L4), relationships (ARD1), and marriage (I4). For example, one male teenager highlighted that the uneducated youth in his Samburu community tend to follow more traditional approaches to marriage, while educated youth tended to date and socialise with potential partners for a longer period of time before marrying (ARD1). This indicates that education plays a role in shifting gender relations even prior to marriage in terms of how young Samburu approach relationships.

Kenya's educational apparatus plays a role in women's economic empowerment, as when women are educated, they are more likely to earn income.⁵⁴ When women have control over their own incomes, decision-making in the home naturally shifts to reflect changing dynamics between wife and husband. In fact, multiple interviewees suggested that women's increased capacity to earn income resulted in increased decision-making within the household.

Additionally, increases in participation in the labour market and in the level of income women can earn, have the potential to encourage women to postpone marriage as it reduces dependence on men's wages.⁵⁵ Finally, economic empowerment of women through education may lead to empowerment in other ways. For example, a few women suggested that income earning may increase a woman's negotiation power within the home when they are married (L9). In fact, both men and women mentioned that women's income earning capabilities allowed women to be more 'assertive' in the home space.

Being critical of these advances is as important as recognising them. Throughout interviews with community members in Samburu, interviewees said that since girls are expected to partake in certain responsibilities at home, it prevents them from studying, which results in lower scores and participation, and more 'punishment' by teachers. This demonstrates how time use becomes a structural problem from an early age. One interviewee said, 'of course the boy child has more free time'

Respondent (translated): Obviously the boys have more free time! Yeah. True. The ladies, they tirelessly work... The boy child, they have that free time. A lot of it, a lot of free time... their responsibilities are not as many as for the ladies, the girl child. (L1)

When female children come back from school, they are expected to help with tasks such as cooking dinner, which gives them less time to study (AL2). When girls arrive at school with their homework not fully finished, they face punishment, whereas the boy children 'who do not cook or clean', do not (AL2). As discussed in one interview, this may discourage girls from continuing their schooling (AL2).

Educating female children means losing more domestic labour in the household than educating male children (L5). With higher expectations that family duties will be prioritised, education is arguably not as important for the constructed responsibilities associated with a girl's family-centred future as for a boy's provider-role future (AL2).

The schooling system does not have specific support for youth marriage and pregnancy, both of which impact women more frequently than men. Interviewees suggested that women's youth marriage was negatively associated with continued studies (AL2). One woman in her mid-twenties explained that she could not finish high school because she was forced into a marriage in which she had two children (L19). Another interviewee added that pregnancy may also provide disincentives for female education (L5).

Additionally, the issue of sexual violence in the school context was an underlying theme in research. On three occasions during three months of fieldwork, I heard about female children being subjected to sexual harassment in schools by their teachers. Some of the girls noted that the threat of sexual violence may not emanate from school settings directly, but rather from the walk to and from school. For adults, interviewees suggest that rates of domestic violence may actually rise in some cases when women become comparatively more economically independent in relation to their husbands (L1), perhaps due to this clashing with constructions of men as the primary providers.

Beyond the physical manifestations of sexual violence, learning material used in schools subject women's bodies to sexualising discourses that equate womanhood and female reproduction. In Kenya, various studies⁵⁶ suggest that this may be reinforced in a school curriculum that uses gendered textbook examples and other learning materials.⁵⁷ One interviewee noted that many young girls had limited sex education, and that their knowledge about gender relations stemmed from outdated textbooks with examples reinforcing women's role in the home sphere.

Beyond domestic, family, and sexual labour considerations, the monetisation of the educational system also raises issues. Several parents named school fees as a cost straining family income (L5). The financial burden of education is not only a hardship for parents,⁵⁸ but contributes to the monetisation of once primarily trade-based economies, which poses questions about preserving cultural tradition. This is especially challenging for widowed mothers, who do not have male partners around to help with income-earning activities for school fees (L1). In addition to cleaning, washing clothes, cooking, collecting firewood, collecting water, waking the children, making the clothing, washing dishes, clearing the homestead, and building houses, widowed mothers must earn income through activities like washing clothing for other homesteads (L1). When asked about specific challenges for widows, a single mother of six said that paying school fees was the number one challenge (L1). At the community level, children can be sent home if they do not have adequate school fees, which results in delaying education and accentuating class-based inequalities.

Women's education is not always supported as an empowerment tool in and of itself, but rather for its benefits to the community (L8 and L9). Since educated women have easier access to economic resources, community members may support women's education as a means to achieve community needs. One parent noted the benefit of children bringing back ideas learned in school for the economic and service-related betterment of his community (I3). Although this can translate to respecting women in communities, support for women's education does not necessarily translate to wholeheartedly supporting women demanding more rights in the home sphere (L8 and L9). In one group interview, a group of older men did not outwardly condemn the fact that women were going to school (L4, L8, and D1), but they lamented that increased education was making women less 'obedient' or 'respectful' in the household (L4, L8, and D1).

Finally, the empowerment of some women through formal education can result in the undervaluing of other women's work (L19). Otherwise stated, women's entrance into the capitalist economy through formal employment relies on the devaluation of what is traditionally considered women's work. By way of example, one female hotel manager with three children hired a woman from Samburu to do the domestic labour in her home. This Samburu woman was also responsible for child-care, cooking, laundry, and cleaning for an average of 16+ hours a day, at less than \$3 per day (L19), far below the minimum wage. This demonstrates how the educational apparatus may indirectly reinforce global capitalist flows through class-based divisions of labour reliant on unpaid, often feminised labour.

Discussion

Education in the context of Kenya is a potentially emancipating force that can help women break out of existing patriarchal gender structures. Educated women may have an easier time empowering themselves financially through controlling their own productive work. This marks a major shift in pastoralist household economics. It means that with increased women's education, the traditional role of men as 'provider' is being put into question, signifying a larger shift in gender norms. Increased female enrolment in schools challenges how much time women are present in the domestic sphere and may alter decision-making about money, which disrupts feminised labour by expanding its definition. Additionally, one of the older women in one of the communities said that years ago, pastoralist men would never have considered themselves 'feminists' (AL2), but it appears that today they are adopting this language. Whether or not all self-proclaimed feminists actually espouse the characteristics of feminists is another question entirely,^v but the Kenyan state's push towards women's education may play a role in this discursive change.

Despite these advances, being overly celebrative of a neoliberal educational apparatus obscures the gendered assumptions it supports. The Kenyan educational apparatus reinforces political-economic structures that underpin women's vulnerability through its economic mechanisms. By relying on unequal gendered labour divides and school fees, the educational apparatus reinforces neoliberal economic forces prioritising masculinised, paid work.

Gendered labour divides are the first consideration in question. Formalised education may reinforce constructions of 'womanhood' by making invisible women's unpaid home labour. Specifically, Kenya's educational apparatus disregards differences in gendered labour responsibilities for male children and female children, and the time spent engaged in those responsibilities. Women's existing domestic responsibilities give girls less time to complete homework than their male peers (AL2). This results in gendered participation inequalities, grade differentials, differences in dropout rates, and different prospects for further education.⁵⁹ Additionally, expectations of women's youth marriage and childbirth often put limits on the level of education attainable by women (L5).

School fees imposed by the Kenyan state reinstitute the male household head as the masculinised breadwinner.⁶⁰ This is especially true

v Of the four men I spoke with who considered themselves 'feminist', one of them actively condemned domestic violence (L15), while another suggested it was a necessary way of asserting manhood (L4). One suggested men had 'sexual needs' that 'docile women' did not have and thus, the practice of polygamy should continue (L16). Another disagreed, suggesting this was simplifying (L15). These examples demonstrate the limits of generalising categorisations such as 'educated men' or 'uneducated men', and the fluidity of 'feminism(s)'.

in contexts where the majority of traditionally ‘women’s work’ within the home sphere continues to be unpaid and therefore ‘unproductive’. By demanding school fees, Kenya’s educational apparatus reinforces an economic order between husband and wife in which men’s paid work is inherently more valuable than women’s unpaid work. This further devalues women’s place in the home in cases where women do not earn income. Although access to schooling can lead to increased potential for income earning, it may not lead to enough women’s empowerment to transcend the structural barriers keeping women in poverty, especially considering continued expectations of women in the home sphere.⁶¹ A monetised educational apparatus may reinforce global capitalist flows, making unpaid labour, often carried out by women, invisible(L19). Monetising education has implications for gender, but perhaps more so for the intersection of gender and class dynamics within communities.

It bears mentioning that the Kenyan state does not control the gendered way the current economy functions. Due to the unequal values placed on girls’ formal education relative to their parents’ household income, educating female children may not make as much economic sense for families as educating male children.⁶² Female children move away from their parents when married, dis-incentivising investment in their education.⁶³ In short, female education represents a greater economic cost for families than male education.⁶⁴ This is independent of larger structural factors beyond Kenya’s educational apparatus.

However, schools are gendered institutions that transmit dominant gender hierarchies.⁶⁵ They are also economic institutions that reinforce those ideologies. Wainaina (2011) discusses how discourse surrounding Module II programs in public universities in Kenya portray universities as “merchandising” knowledge,⁶⁶ and questions whether women can benefit as much from these programs as men.⁶⁷ Although socialisation processes learned at home are not the fault of the educational apparatus, Kenya’s educational apparatus plays a passive role in reinforcing power dynamics involved in such constructions by not challenging these assumptions. Foulds (2013) explores images depicting labour in Kenyan textbooks, concluding that there exist a ‘continuum of gender identities’, sometimes undervaluing women’s labour.⁶⁸ Although the educational apparatus has redeeming qualities and is understood as ‘necessary’ by pastoralists, it reinforces gendered behaviour in ways that undermine gender-equalising developments. Increased female enrolment in schools has the potential to deconstruct male dominated spaces, but understanding the limitations of expansionary education provides insight into the ways formalised education is conducted and made possible.

Focusing on the limitations of education serves to question the taken-for-granted assumption that women's educational expansion is always necessarily positive. In addition to making an institution more easily accessible to women, perhaps the answer also lies in reformulating what gender-sensitive institutions, including the educational system, look like.

There is a distinction between a state's educational policies on gender and the practice of how those policies play out. Policy is related to tangible characteristics of school regulation by the state, including legal mechanisms, curriculum standards, and employment practices within schools. Some policies related to educational advancement encourage gender equality in the home sphere, such as laws forbidding gender violence in school spaces and encouraging access to public schooling for boys and girls.⁶⁹ On the other hand, practice refers to the cultural values that influence these policies, are received by these policies, or are not considered by them. Despite policy efforts at gendered inclusion, sometimes educational policy and practice are not in line.⁷⁰

The Kenyan state is taking steps to reduce disparities in gendered access to education. This paper does not discount these strides as numerically and discursively relevant for challenging gendered hierarchies in multi-scalar ways. Kenya stands out from other sub-Saharan countries with regards to a higher proportion of females in school, both in real numbers and in comparisons between males and females at primary and secondary levels.⁷¹ Between 1990 and 1998, there was a 23.5% increase in female enrolment at the secondary level compared to 5.6% for male enrolment, which demonstrates a significant push for female education.⁷² Although this statistic obscures that female enrolment was significantly lower than male enrolment to begin with, it does suggest that state-supported efforts are taking place to address inequalities in school enrolment.

However, the entrenchment of gendered assumptions through a gendered educational apparatus may reinforce gendered labour in homes. This is especially true when the state neglects to account for gendered assumptions at home which influence socialisation processes that underline appropriate gender behaviour at school. For this reasons, this paper disagrees with Kabiru Kiyanjui's celebration of the 'near gender parity in enrolment statistics as a clear indicator of the state's success in addressing the problem of educational gender inequity'.⁷³ Inclusive educational policies, such as pushing for women's enrolment in schools, have the potential to increase women's participation without necessarily removing structural barriers to their success. Shifting gender relations does not necessarily translate to gender equity. Women's access to education does not translate to an unravelling of patriarchal norms within schools or

homes without a more complete restructuring of the educational system.

The Kenyan state is making important strides in addressing gender inequalities through education.⁷⁴ Again, both elders (L9 and I3) and youths (L13) in Samburu and Laikipia were adamant about the benefits of education for women's empowerment. Women's increased time spent in schools alters the home sphere by re-scheduling time spent engaged in home-related activities. Since schools provide opportunities for peer socialisation, lessons learned there shape the minds of pupils of all genders, lessons which are transferred to the home space. Additionally, increased economic empowerment shifts gendered labour expectations at home. Interviewees suggested that rising rates of education for women led to changing dynamics between husband and wife (I5, L8, L13, L16, L17, L21), and increased women's economic earning capacity (L5, AL2, L17).

Nevertheless, this paper has attempted to demonstrate that when a state's educational apparatus does not question constructions of 'womanhood' based on gendered relations of labour in the home sphere, policies towards more inclusive education obscures the patriarchal underpinnings of home and community life that are so ingrained in schools. There is a widely-held assumption that the expansion of schooling is an extension of human rights, women's rights, and 'the main instrument by governments and society in general to achieve equality among diverse social groups'.⁷⁵ Yet, an educational apparatus which disregards gendered labour responsibilities can misconstrue the fact that male and female children do not spend the same amount of time on schoolwork.⁷⁶ When the state asks for school fees, this must come with the understanding that this reinforces male dominance in pastoralist societies, as men are considered the primary income earners. Simply stated, the state's educational apparatus can accentuate male dominance within households when women cannot contribute to household income.⁷⁷ Even when women do contribute to household income, this omits other gender dynamics underpinning women's subordination in the home sphere, including but not limited to youth marriage and sexual violence.⁷⁸

As Nelly P. Stromquist eloquently states, 'schools are institutions that protect a very uneven gender status quo'.⁷⁹ Although the Kenyan state's educational apparatus is working to challenge dominant gender paradigms at home by increasing female participation in schools and encouraging economic empowerment for women, it is doing so within a patriarchal framework. By suggesting economic empowerment and increased employment for women leads to more equitable gender relations at home, the Kenyan state's educational apparatus is disregarding, and therefore upholding, masculine ideals in school spaces. This is perhaps because, like other states,⁸⁰ the Kenyan state has stakes in reproducing masculinised superiority through socialised expectations of labour.⁸¹

Appendix A: Maps

Figure 1: Map of Kenya with fieldwork locations.



Figure 2: Closer view of areas visited during the fieldwork period in the summer of 2019.



For an interactive version of these maps please visit the following link courtesy of Google Maps: <https://drive.google.com/open?id=1SduPOeAW3RuLa21QDN4CgK8VMv3Mhhr3&usp=sharingto>

Fieldwork Sites (Name of Town or Community)



Malasso	– Formal interviews
Maralal	– Formal & Informal interviews
Kisima	– Formal & Informal interviews
Suguta Marmar	– Formal interviews
Kirimon (x2 locations)	– Formal interviews
Kirimon Centre	– Formal interviews
Naibor Keju	– Formal interviews
Sagumai	– Formal interviews
Lmari	– Formal interviews
Loogor-ate Centre	– Formal interviews
Nkiloriti	– Informal interviews
Musul (x 3 locations)	– Informal interviews
Kimanzo	– Informal interviews
Nanyuki	– Formal & Informal interviews



Women's Groups (Name of Group)

Osugoroi Self-Help-Group	– Informal interviews
Twala Women's Group	– Informal interviews
P.C.E.A. Nanyuki Weavers	– <i>Informal interviews</i>
Sera Women's Group	– <i>Informal interviews</i>
Naisunyai Women's Group	– <i>Informal interviews</i>
Ngutuk Women's Group	– <i>Informal interviews</i>
Kalama Women's Group	– <i>Informal interviews</i>



Conservation Areas

Ol Jogi Wildlife Conservancy	
Mugie Wildlife Conservancy	
Borana Wildlife Conservancy	
The Ol Lentille Conservancy	
Mukogodo Forest	
Rumuruti Forest	
Maralal National Sanctuary	– <i>Informal interviews</i>
Sweetwaters Game Reserve	
Lewa Wildlife Conservancy	– <i>Informal interviews</i>
Ngare Ndare Forest	
Sera Conservancy Trust	– <i>Informal interviews</i>
West Gate Conservancy	– <i>Informal interviews</i>
Kalama Conservancy	– <i>Informal interviews</i>

Appendix C: List of Interviews^{vi}

Interviews conducted by Laurence LeBlanc (some translated by Rhodah Seriana) in 2019

- L1: Widowed mother of six, in her *boma*^{vii} preparing circumcision clothing – June 12
- L2: Male herder, around 50 years of age, stepping into L1 interview – June 12, Kirimon
- L3: Young mother in her *boma*, exasperated, holding two children – June 12, Sagumai
- L4: Three men, one elder of 85, one man of 40, one man of 20 – June 12, Kirimon
- L5: Young woman taking care of other children as mothers fetch water – June 13, Sagumai
- L6: Two women who've returned from 4 hours of fetching firewood – June 13, Sagumai
- L7: Two small male children, ages 4 and 5 – June 13, Sagumai
- L8: Male elder outside of health clinic – June 14, Loogor-ate Centre
- L9: Joy, 85-year-old female elder outside her *boma* – June 15, Lmari
- L10: Group of young boys – June 15, Lmari
- L11: 2 *moran*^{viii} brothers aged 19 outside *boma* overlooking forest – June 15, Lmari
- L12: 20-year-old mother in temporary house – June 15, Lmari
- L13: Informal interviews with 25 year old female educated translator, Rhodah – Samburu
- L14: Informal interviews with young 28-year old lawyer in Nanyuki
- L15: Informal interviews with 25-year-old male, recently finished undergraduate degree
- L16: Informal interviews with local fieldwork organiser
- L17: Informal interviews with the production manager of *Beadworks*
- L18: Informal interviews with successful female cafe owner in Nanyuki
- L19: Informal interviews with 26-year old Samburu woman working in Nanyuki
- L20: Informal interview with uneducated middle-aged male living in Nanyuki
- L21: Informal interview with educated woman, daughter of Former Village Administrator
- L22: Informal interview with the Osugoroi women's group in Chumvi
- L23: Informal interview with women from Archer's Post beading initiative

vi Informal interviews extend beyond those listed, but those listed are the most substantive.

vii 'Boma' refers to a traditional Maasai home made of branches and mud.

viii 'Moran' is the name given to male Maasai who have completed warrior training.

L24: Informal interview with educated middle-aged man living in Nanyuki

Joint Interviews

LS1: Chairperson of Naserian and her friend, both elderly women – June 14, Loogor-ate

LS2: Chairperson of Twala Women's Group – May 23, Il Polei

Key:

'L' stands for primary investigator Laurence LeBlanc.

'S' stands for secondary investigator Sasha Masabanda, MA Political Science, McGill.

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US COLONIALISM IN PUERTO RICO: WHY INTERSECTIONALITY MUST BE ADDRESSED IN REPRODUCTIVE RIGHTS

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Abstract

Puerto Rico is the oldest existing colony in the world. The Island was colonised first by Spain in 1493 and then by the United States (US) in 1898. This article explores systematic and institutional violences committed throughout the early to mid-twentieth century by the US against Puerto Rican women on the Island. US colonialists blamed Puerto Rican women for the Island's poverty and targeted them in colonial initiatives. In this article the term 'colonialists' refers to diverse actors in influential positions such as in private industries, government agencies, and research positions who advocated for colonialism in Puerto Rico. The pages below examine how such colonialists utilised eugenics ideologies to (1) describe the Island's poverty as due to overpopulation; (2) insist that Puerto Rican women refrain from sex; and (3) 'justify' dangerous birth control trials on Puerto Rican women and coerced sterilisation of Puerto Rican women. The article concludes by examining how during the second-wave feminist movement that emerged Stateside in the 1960s, Puerto Rican women drew attention to women's victimisation on the Island to argue for an inclusive and intersectional definition of reproductive rights.

Introduction

Puerto Rico is the oldest existing colony in the world. The Island was colonised first by Spain in 1493 and then by the United States (US) in 1898. This article explores systematic and institutional violences committed throughout the early to mid-twentieth century by the US against Puerto Rican women on the Island. US colonialists blamed Puerto Rican women for the Island's poverty and targeted them in colonial initiatives. In this article, the term 'colonialists' refers to diverse actors in influential positions such as in private industries, government agencies, and research positions who advocated for colonialism in Puerto Rico. Colonialists possessed diverse positions of power and privilege and maintained diverse interests that drove their colonial efforts. For example, some colonialists strove to control and benefit from the Island's

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natural resources, social capital, industries, and/or the strategic location of the Island for US military strength. Moreover, many (although not all) colonialists embodied a righteous assumption that their own customs, beliefs, backgrounds, knowledge, and cultural behaviour were superior to Puerto Ricans. The pages below examine how colonialists utilised eugenics ideologies to (1) describe the Island's poverty as due to overpopulation; (2) insist that Puerto Rican women refrain from sex; and (3) 'justify' dangerous birth control trials on Puerto Rican women and coerced sterilisation of Puerto Rican women. The article concludes by examining how during the second wave feminist movement that emerged Stateside in the 1960s, Puerto Rican women drew attention to women's victimisation on the Island to argue for an inclusive and intersectional definition of reproductive rights.

Defining the Collective Identity '*Puerto Rican Women*'

The term 'collective identity' refers to a group of people who share an identity that endures discrimination and/or privilege. Furthermore, the term refers to how the group of people collectively define their shared identity in systems of power. It is useful to apply an intersectional analysis to collective identities to reveal the complexity of human experience. Intersectionality refers to how a person experiences their multiple identity traits simultaneously which impacts the way they are treated in and behave in identity-based power hierarchies. For example, a person does not experience one form of discrimination at a time (such as sexism). Rather, they experience multiple forms of discrimination simultaneously (such as sexism, racism, and classism). In other words, mono-categorical investigations into discrimination mask differences within collective identities and do not effectively address how individuals experience oppression and/or privilege in multiplicity due to the interlocking and interdependent nature of their identity traits. Likewise, people normatively experience compounded forms of oppression and/or privilege, however in some contexts such experiences are reduced and in other contexts are magnified. Next, identity traits are also fluid and are constantly redefined and reconstructed due to social, economic, and political influences.

Some analyses of collective identities focus on one trait (such as *women*). However, this article focuses on an intersectional collective identity (*Puerto Rican women*). The intersectional analysis reveals that Puerto Rican women have experienced compounded and interrelated forms of systematic and institutional discrimination due to being both Puerto Rican and women. However, there are limitations to analysing the intersectional collective identity *Puerto Rican women*. *Puerto Rican women* (like all collective identities) is internally diverse. For example, each individual Puerto Rican woman's experience differs when taking

into account her age, language/s, religion, skin colour, social class, family design, sexuality, dis/abilities, gender, sex, gender performance, experience/s with trauma, urban or rural place of residence, and other defining traits.

Moreover, *Puerto Rican women* is an especially complex collective identity because many Puerto Ricans live in the continental US.ⁱ The collective identity *Puerto Rican women*, therefore, can describe women who live on the Island as well as those who live in diaspora. Puerto Ricans in diaspora commonly identify with and have affective as well as familial connections to the Island. Similarly, some Puerto Ricans participate in a circulatory migration pattern to and from the Island/Stateside because of cultural and familial reasons. Competitive economies Stateside, the need for remittances in Puerto Rico, cultural and familial ties, as well as the legality of migration to and from Puerto Rico contribute to the circulatory migration. This circulatory migration further destabilises *Puerto Rican women* as a collective identity that is solely women who live on the Island. *Puerto Rican women* is an identity that is in flux, has diverse and multiple meanings to diverse people, and expands beyond the boundaries of the Island.

Nevertheless, generalising the collective identity *Puerto Rican women* (as noted above) is useful to identify trends in the group's experiences with systematic and institutional discrimination. Hence, this article first strategically examines colonial racist and sexist policies implemented on the Island that targeted women in Puerto Rico. The article thereafter strategically focuses on Puerto Rican women in diaspora that mobilised for reproductive rights to address intersectionality. This article examines the specific activism of Puerto Rican women Stateside to reveal how they contributed to developing intersectional theory as well as how second wave feminism was exclusionary and discriminatory.

The Blame Game: Are Puerto Rican Women Responsible for the Island's Poverty?

US colonialists historically framed the Island's poverty as due to overpopulation produced through Puerto Rican women's 'reckless' breeding. Colonialists based their perceptions of population control on Malthusian ideologies that were popular among US citizens when the US colonised Puerto Rico. Malthusianism insisted that reducing and controlling population sizes would safeguard against diminishing natural resources and destruction of the environment. Charles Herbert Allen, the first US-installed governor in Puerto Rico, utilised Malthusian ideologies to declare Puerto Rico's poverty as due to 'excess people'; his assumption is well documented in his official report discussing Puerto Rico's population from May 1, 1900 to May 1, 1901 submitted to US

i To date, approximately half of Puerto Ricans live Stateside.

Congress. The second US installed governor on the Island, Arthur Yager, continued to promote Malthusianism and reduction of the Puerto Rican population when he also submitted an official report to US Congress.

Other colonialists supported the overpopulation discourse and promoted US colonialism as a civilising mission that would benefit Puerto Ricans. For example, the influential political writer Theodore Schroeder published 'Porto Rico's Population Problem' which constructed Puerto Rico as a poverty, disease, and unemployment-ridden Island with too many islanders for the resources available. Likewise, the US Bureau of Vital Statistics routinely insisted that Puerto Rico's poverty was due to overpopulation. James Bourne, a director of the US Federal Emergency Relief Administration, insisted when reporting to Congress that Puerto Rico's social issues were caused by overpopulation and that this 'overpopulation' was the Island's most serious hardship. The colonialists insisted that Puerto Rican women must restrain their sexual urges and limit their reproduction to diminish the Island's population. Colonialists portrayed Puerto Rican women as passive, dependent, sexually deviant, sickly, and diseased compared to middle to upper class white women Stateside whom colonialists framed as superior, virtuous, and capable of controlling their sexuality. Therefore, Puerto Rican women's bodies became a primary target in colonial policies.

Malthusian and paternalist assumptions about Puerto Rico were compounded by eugenics ideologies. Eugenics ideologies about racial cleansing to promote an idealised homogenous white race to 'improve' the quality of humans influenced population control in Puerto Rico. Eugenics 'science' was a cultural construction that interpreted and framed scientific data through racist and sexist lenses and argued that the quality of populations can improve through selective breeding. Eugenics ideologies originated in Europe (for example by English leaders such as Francis Galton) in the eighteenth and nineteenth centuries, and gained popularity in the US throughout the early twentieth century. Eugenics organisations emerged Stateside in the twentieth century with organisations such as the Human Betterment Foundation as well as the American Eugenics Society. Similarly, individual eugenicists such as Raymond Pearl and Clarence Gamble spearheaded projects to put eugenics theory into action by targeting Puerto Rico for eugenics research. Eugenicists in government positions, medical positions, and diverse positions of power advocated for racial 'betterment' through selective breeding and targeted Puerto Rican women. The research targeted the women because eugenicists viewed their reproductive capacities as key to reproducing populations.

Puerto Rican women who engaged in sex were seen as failing and impoverishing their nation by reproducing members in it. Therefore, colonial discourse advocated that Puerto Rican women's worth as members of their nation was based on their sexual activity. They were

portrayed as not deserving motherhood and as inadequate women to reproduce a nation compared to middle to upper class white women who were portrayed as 'respectable' women who should procreate.

Puerto Rican women have the reproductive capacity to birth members of the Puerto Rican nation, yet they can also birth US citizens: in 1917 the US awarded Puerto Ricans US citizenship. To understand Puerto Ricans' positioning in the US citizenship model it is crucial to acknowledge the historical formulation of US citizenship in general. The 1790 Naturalization Act created US citizenship and awarded the privilege only to people whom the government declared as practicing 'good character' and were white and not enslaved/indentured servants. This discriminatory citizenship model excluded people of colour and many women. When Congress granted Puerto Ricans US citizenship in 1917 some collective identities previously excluded from US citizenship were granted the privilege. Yet the US citizenship model remained discriminatory despite Congress envisioning US citizenship as designed for an 'abstract' individual. This individual, in fact, has never been abstract. The US has practiced a hierarchal citizenship model where some citizens (particularly white middle to upper class males) have been prioritised in the model and simultaneously have had the most influence over how state institutions legislate, monitor, and address citizens/citizenship. In effect, the US has treated women and people of colour as second-class US citizens whose needs do not deserve equal urgency or attention compared to white middle to upper class males.

Furthermore, Congress has treated Puerto Ricans as third-class US citizens. Puerto Ricans have experienced systematic and institutional race, class, and gender-based discrimination in the citizenship model. They also have not had the same voting rights or access to the same welfare provisions or public benefits as other US citizens and have not been permitted to vote in presidential elections if they reside on the Island. The US has, therefore, throughout history perceived and treated Puerto Ricans as inferior in the US citizenship model and as people whose humanity does not deserve protections equal to other US citizens. In this sense, Congress has made its stance clear: Puerto Ricans are not ideal US citizens. Colonialists internalised and mirrored this devaluing of Puerto Ricans, and thusly insisted that Puerto Rican women should not engage in sex and repopulate Puerto Rico. In conjunction with portraying Puerto Rican women as dangerous to the Island's residents, colonialists also framed them as biologically reproducing 'undesirable' US citizens. What was the solution? It was birth control and sterilisation.

Birth Control and Mass Sterilisation

Colonialists determined shaming Puerto Rican women into not having sex must be accompanied by proactive measures to ensure they

do not procreate. Birth control and mass sterilisation would effectively diminish the Puerto Rican population. In 1925, Puerto Rico's first birth control clinic, which was referred to as the Birth Control League of Puerto Rico, opened in San Juan. However, the Catholic Church and many of its Puerto Rican supporters opposed the reproductive measures.

Throughout the twentieth century, Catholicism was the most commonly practiced strain of religion in Puerto Rico due to the legacies of Spanish colonialism in the Island. The Catholic Church influenced Puerto Rico's resistance to contraceptives by declaring sex as sinful unless for procreation and by declaring any form of contraception immoral. In opposition to this resistance colonialist Blanton Winship, who from 1934 to 1939 was the US installed governor on the Island, campaigned that Puerto Ricans must reject their religious viewpoints and use the reproductive technologies. The Franklin D. Roosevelt administration supported Winship's stance and rigorously advocated for birth control in Puerto Rico. Similarly, when James Bourne directed the US Federal Emergency Relief Administration he reported to Congress that birth control would effectively diminish issues related to assumed 'overpopulation'.

Colonial support for contraceptives remained strong as decades passed, despite Catholic resistance to the measures. This support resulted in Puerto Rican women being used as test subjects for dangerous birth control pill trials in the 1950s. US biologist Gregory Goodwin Pincus coinvented an oral contraceptive pill with obstetrician and gynecologist John Rock. Pincus determined Puerto Rico was a desirable location to test trials of the pill because the Island is a US territory where contraceptives had been legalised for years. Likewise, Rock hoped Catholics would more readily accept the pill compared to other reproductive technologies since it did not need to be ingested during sex. Since a pill could be orally ingested at any time instead of during intercourse it may possibly be more accepted due to being slightly disassociated from sex. Rock insisted that while members of the Church may not openly condone the pill, privately they often expressed their support for the form of contraception.

The fact Pincus and Rock targeted Puerto Rican women on the Island for birth control trials aligns with Congress constructing Puerto Ricans as third-class US citizens. Rock and Pincus could conduct their operations within the jurisdiction of the US in the colony yet could test the pill on women that were citizens of 'less worth' than more privileged US citizens. Feminist scholarship about body politics describes how public and private industries and institutions have historically treated women's bodies as not being fully their own personal property, and rather as constantly needing patriarchal and paternalist intervention. In patriarchal ideologies, women have been portrayed as not capable of fully controlling their reproductive capacities without guidance. While US female citizens have been subject to this intervention at varying

levels depending on their intersectional identities, Puerto Rican women's positioning as third-class US citizens made them especially vulnerable to Pincus' and Rock's trials because of the women's devalued positioning in the US citizenship model. They were bodies of 'less worth' and thus were acceptable subjects to accept the trials' risks.

Other types of technologies directly associated with intercourse also continued to be developed and tested in spite of Catholic resistance to contraceptives. For example, in 1958 Puerto Rico's Family Planning Association received a free shipment of aerosol foam which was tested in one of San Juan's most impoverished areas. The tests of various forms of birth control in some cases negatively impacted Puerto Rican women's health and in a few cases resulted in death. Colonialists disregarded these risks because if potentially harmful birth control trials proved safe after being tested on Puerto Rican women, these reproductive technologies could be safely used and sold Stateside. Women that were deemed of more value were not at risk.

Throughout their promotion of birth control, colonialists also strove to sterilise Puerto Rican women. Support for this endeavor was so influential that in the 1930s the Puerto Rican legislature created an insular sterilisation board. Colonial imposition prompted the passage of Puerto Rico's eugenics sterilisation Law 116 and Law 136 which encouraged the Island's Commissioner of Health to 'teach and practice eugenics principles.' The legislation encouraged the sterilisation of people who were impoverished, in poor health, and malnourished—a list of criteria which conveniently included most Puerto Rican women.

By the 1950s, the US Federal government spearheaded 'Operation Bootstrap' which included an initiative to sterilise women on the Island. Noting that sterilisation is more permanent compared to other forms of birth control, eugenicists promoted sterilisation as the most ideal reproductive technology to control Puerto Rican women's 'reckless' breeding. Representatives in Congress also advocated for sterilisation out of concern that overpopulation would drain welfare and social protection programs.

Mass sterilisation of Puerto Rican women continued for decades. In the mid-1970s alone, the US Department of Health sponsored more than twenty nine thousand sterilisations of Puerto Ricans, with more than ninety percent of the procedures being performed on women. By the 1980s, about one third of Puerto Rican women of childbearing age were sterilised. In the 1980s Puerto Ricans experienced among the highest rates of sterilisation in the world. Sterilisation is still common on the Island today. Some scholars and activists have described the above abstinence, birth control, and sterilisation measures as genocide.

It is critical when investigating US initiatives to reduce the Puerto Rican population to acknowledge similar efforts Stateside towards low-income women of colour. Such women also experienced

coerced sterilisation. Prior to the 1960s, Congress did not govern sterilisations by law, yet low-income women of colour were frequently subject to sterilisation for eugenics reasons; particular women were targeted specifically because government or medical workers viewed them as weak and uncontrollably promiscuous. Since sterilisation was not governed by law prior to the 1960s, individual government workers or physicians had the power to make decisions about which sterilisations were medically and/or socially appropriate and thus permissible to perform. The majority of government workers and physicians making such decisions were white men. Thus, white men had notable agency over the bodies of women of colour. Similarly, middle to upper class white women often had access to financial resources to undergo sterilisation if they chose to do so, yet low-income women of colour had to obtain support for the procedures through systematically racist, sexist, and classist public health, welfare programs, and state institutions. Seeking services and support in these discriminatory institutions was in many cases humiliating and emotionally painful. Drawing from this similar history, Puerto Rican women in diaspora began mobilising among communities of colour Stateside to recognise and object to colonial imposition on Puerto Rican women's bodies on the Island.

Stateside Activism Against Colonial Devaluation of Puerto Rican Women

Throughout the 1960s, second wave feminism emerged Stateside. In general, the movement centered on the needs of white middle to upper class women, as this demographic possessed the greatest economic, social, and cultural capital to define and advocate for 'women's needs.' As noted earlier in this article, generalising a collective identity such as !woman! can be effective to highlight and advocate against systematic and institutional discrimination of the collective identity. However, strategically essentialising an identity for this purpose tends to privilege the needs of the most powerful members of the group in question and marginalise the needs of less powerful members of the group. Reproductive rights were a primary goal for white women who dominated the second wave feminist movement. Yet, their advocacy centered mainly on what white women in the era considered to be the most important issues regarding reproductive rights, such as legalisation of abortion and sterilisation. White women tended to view advocacy against coerced sterilisation/birth control trials as in opposition to their support for reproductive rights. Comparatively, Puerto Rican women in diaspora often supported abortion and sterilisation rights but advocated against coerced sterilisation/birth control trials which they rightly discerned as in conflict with their reproductive freedom and health.

New York Puerto Rican Helen Rodríguez-Trías was a women's

public health advocate who drew attention Stateside to the history of colonial devaluation of Puerto Rican women's bodies on the Island. In 1971 in Minneapolis she attended an American Public Health Association meeting to admonish the history of coerced sterilisation and birth control trials in Puerto Rico. A few years later, in Boston in 1974, she spoke on a panel about sterilisation abuse at a women's rights conference attended by thousands of women; at the conference she realised that white second wave feminists in general did not support her cause. Many of the white feminists resisted her stance due to their personal experiences seeking sterilisation from their doctors who rejected their pleas because they were not married or had 'too few children'. The coercion of white middle to upper class women to procreate in comparison to efforts to diminish the Puerto Rican population and other populations of colour is reflective of eugenics ideologies about racial 'purification'.ⁱⁱ

Rodríguez-Trías, among other Puerto Rican activists, was not deterred by resistance to Puerto Rican women's demands for reproductive justice. Rodríguez-Trías co-founded the Committee to End Sterilization Abuse (CESA) as well as the Committee for Abortion Rights and Against Sterilization Abuse (CARASA). CARASA and CESA insisted that reproductive rights cannot be separated from issues of race, age, gender roles, economic status, and sexuality, and thus that such rights must address these intersectional needs. Withstanding second wave feminist resistance to intersectionality, the organisations gained enough traction to successfully influence the federal government to implement consent based sterilisation guidelines in 1979.

The Young Lords Party, a Puerto Rican civil and human rights organisation founded Stateside in the late 1960s, also drew attention to coerced sterilisation and birth control trials in Puerto Rico. Women achieved partial leadership in the multi-gender organisation and successfully mobilised the Party to address the reproductive abuse history in Puerto Rico. The Young Lords held events and distributed a series of publications that drew attention to the history and defined it as attempted genocide. Similar to CARASA and CESA, the Young Lords insisted that reproductive justice cannot be separated from intersectional issues regarding racism and classism. The organisation gained traction among communities of colour due to their shared experiences with sterilisation abuse and institutional racism/classism. Thus, Puerto Rican women in diaspora effectively mobilised other US women of colour

ii Prior to the emergence of second wave feminism, some first wave feminists advocated for eugenics ideologies in the early twentieth century (for example, Margaret Sanger in her book *Women and the New Race*). However, this advocacy eventually conflicted with white women's second wave feminist goals for abortion and sterilisation rights. Eugenics ideologies insisted middle to upper class white women must reproduce however second wave white feminists strove to limit their reproduction through sterilisation and abortion rights.

Stateside to rebuke the history of colonial intervention into women's bodies on the Island.

Puerto Rican feminist scholars in diaspora such as Virginia Sánchez Korrol, Rosa Estades, Clara Rodríguez, and Olga Jiménez Wagenheim also raised awareness about the history of colonial devaluation of Puerto Rican women on the Island. Such scholars, similar to Puerto Rican activists, highlighted the unique experiences of Puerto Rican women on the Island in relation to their intersectional collective identity. The scholars were so persuasive that the US-based academic field of Puerto Rican studies have in many cases examined intersectionality and documented and dispersed extensive scholarship about the birth control trials and coerced sterilisation on the Island.

I constructed this article to build on Puerto Rican women's feminist plights Stateside while calling attention to the specific experiences of Puerto Rican women on the Island. Although the collective identities are geographically divided, Puerto Rican women Stateside have been affectively connected to those on the Island and their efforts prove this reality. This article provides evidence of how colonialists historically blamed Puerto Rican women for the Island's poverty by using overpopulation discourse and colonialists also intervened with their bodies through birth control and sterilisation. Puerto Rican women in diaspora contributed to developing intersectional theory and resisted second wave feminism's discriminatory approaches. Puerto Rican women in diaspora mobilised for greater recognition of women's experiences on the Island and explained why intersectionality must be addressed in reproductive rights.

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36 Ramírez de Arellano, *Colonialism, Catholicism, and Contraception*, 1983. US colonial efforts regrading sterilisation aligned with other eugenics imperialism that occurred from Western to developing nations. Marguerite Waller and Sylvia Marcos' *Dialogue of Difference: Feminisms Challenge Globalization* rightfully note that eugenics ideologies often urged developing nations to reduce their population in contrast to advocating for the growth of Western countries' predominantly white population. The ideologies were based on assumptions that middle to upper class white people in Western nations have better genes and thus must reproduce compared to developing nations' residents who were predominantly people of color with undesirable genes and thus must limit reproduction.

37 Lopez, *Matters of Choice*, 2008.

38 Ramírez de Arellano, *Colonialism, Catholicism, and Contraception*, 1983.

39 Briggs, *Reproducing Empire*, 2002.

40 Ibid.

41 Ramírez de Arellano, *Colonialism, Catholicism, and Contraception*, 1983.

42 Ibid.

43 Johanna Schoen. 'Between Choice and Coercion: Women and the Politics of Sterilization in North Carolina, 1929-1975', *Journal of Women's History* 13(1), 132-156. (2001).

44 Ibid.

45 Ibid.

46 Joyce Wilcox, 'The Face of Women's Health: Helen Rodríguez-Trías', *American Journal of Public Health* 92(4), 566-569 (2002).

47 Ibid.

48 Ibid.

49 Wilcox, *The Face of Women's Health*, 2002.

50 Ibid.

51 Iris Morales. *Through the Eyes of Rebel Women: The Young Lords 1969-1976*. (New York, New York: Red Sugarcane Press, 2016).

52 Darrel Enck-Wanzer, ed. *The Young Lords: A Reader*. (New York, New York: New York University Press, 2010).

53 Ibid.

54 Félix Matos Rodríguez and Linda Delgado, eds., *Puerto Rican Women's History: New Perspectives*. (New York, New York: Routledge, 1998).

GENDER IS WHAT STATES MAKE OF IT: GENDER, NATION-BUILDING, AND WAR IN ISRAEL

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Abstract

This paper engages with recent work within Feminist IR theory which identifies a correlative – and, in some cases, posits a causal – relationship between gender inequality and war. Using the outlier case of Israel, a relatively gender equal yet militarised state, it contests assumptions that gender equality and war are incompatible phenomena. In tracing processes of gender construction from the Yishuv to contemporary Israel, this paper finds that Israeli elites have actively developed ideologies of gender in response to the particular security threats faced by the state. Women have performed multiple security roles throughout the short history of the Israel: ‘mothers of the nation’, soldier-citizens, and visual symbols of ideological affinity with Western allies. The paper suggests that this tripartite construction of the female gender may explain Israel’s outlier status because women’s soldier-citizen role (albeit secondary to men’s role in this regard) both raised the status of the female gender within Israel’s nation-building project and socialised many women to ideologies of militarisation: unlike many other countries, there is limited evidence of a gender gap in support for aggressive policies within Israel. The Israeli case also demonstrates that ideological commitments to gender quality – and their instrumentalisation in international alliances – can mitigate against dynamics of inequality generated by the ‘maternalisation’ of women’s security role and can co-exist with a prevailing ideology of militarisation.

Introduction

Many feminist scholars and policymakers have long assumed a relationship between gender and war, most commonly premised upon the theory that conflict is rooted in the oppression of women. Initially, these ideas were embedded in a reductionist understanding of gender in which women were biologically conditioned to be passive and men to be violent.¹ Under this paradigm, men necessarily conducted world affairs in a violent and competitive manner, and the exclusion of women meant the marginalisation of feminine traits of compromise and pacifism in global politics. The constructivist revolution in gender theory exposed gender as a socially constructed phenomenon, overturning the consensus

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on men's biological predilection for violence and their dominance of power structures as the explanation for war.² Nevertheless, a belief that a relationship exists between gender and conflict has persisted.

This belief has also, in the last decade, finally been buttressed by empirical findings. Recent work by second-wave, positivist Feminist scholars such as Valerie Hudson, Bonnie Ballif-Spanvill, Mary Caprioli, Rose McDermott, and Chad Emmet has aimed to demonstrate that the greatest indicator of a state's likelihood to engage in violent warfare is its treatment of women. In 'The Heart of the Matter' and *Sex and World Peace*, these scholars sought to establish that the correlation between violence against women and levels of intra- and inter-state conflict is more pronounced than the correlation observed between frequency of conflict and other previously accepted indicators, such as poverty.³ In addition, a body of quantitative empirical work spearheaded by Caprioli has found that states with higher levels of social, economic, and political gender equality are less likely to rely on military force to settle disputes.⁴ More recently, feminist scholars have also shown links between specific practices of gender inequality—such as polygyny and sex selective abortion—and violent conflict.⁵

It would therefore appear that longstanding theories that exclusion and oppression of women are intrinsically linked to conflict have now been empirically verified. Some scholars have even gone so far as to suggest a causal link between the two. For instance, Cynthia Cockburn argues that 'patriarchal gender relations predispose our societies to war. They are a driving force perpetuating war. They are among the *causes* of war'.⁶ For Cockburn, patriarchal gender relations are 'intersectional with economic and ethno-national power relations in perpetuating a tendency to armed conflict in human societies'.⁷ The violence generated by and used to maintain these structures 'foster militarism and militarization. They make war thinkable. They make peace difficult to sustain'.⁸

Flipping the causal logic on its head, other scholars such as Galia Golan—also working within the Israeli case—have argued that conflict and militarisation are among the primary causes of gender inequality. According to Golan, '[a] country in a state of war, by necessity or custom, values the male child above the female'.⁹ For Golan, gender inequality in Israel derives primarily from the centrality accorded the army in Israeli society: 'in a society engaged in war or protracted armed conflict the army assumes an essential and critical role... as the army is a patriarchal institution, it is these patriarchal values, norms and stereotypes that will be promulgated and reinforced'.¹⁰

Alongside this, however, a number of scholars working within feminist theory have recently explored issues related to women's international violence and their military participation. These scholars have examined the ways in which women have sometimes found a form of emancipation in international violence and have occasionally been

willing perpetrators of atrocities.¹¹ Their work has complicated the findings of scholars such as Hudson, Caprioli, Ballif-Spanvill, McDermott and Emmet on the links between the exclusion of women from positions of power and violence.¹²

This paper seeks to investigate the asserted causal link between gender inequality and conflict through an in-depth examination of the case of Israel. The method is primarily one of secondary historical analysis, supplemented with primary archival research and interviews conducted by the author with former female Israeli Defence Forces (IDF) personnel. The paper also uses data from public opinion surveys undertaken by the Israeli Peace Index to explore how the conscription of women in the IDF may have impacted Israeli women's political views on matters of security and conflict.

Within the existing literature, Israel is often presented as a prime example of the link between militarisation and gender inequality.¹³ However, it is a much more complicated case than the existing literature suggests. Israel is in fact a relative outlier when it comes to the relationship between gender inequality and conflict identified by the positivist scholars—demonstrating noticeably higher levels of violent conflict than other states which it sits on par with for gender equality. This indicates that there is something more interesting going on in the Israeli case than has so far been explored.

This paper seeks to shed light on this puzzle through tracing the process of gender construction within Israel in conjunction with the processes of militarisation and securitisation. Within such an investigation, this paper hopes to highlight the complexity of the relationship between security and women's empowerment. It argues that the relationship between the status of women and violent conflict is more complex than first appears and rejects the arguments that the oppression of women is a causal factor in explaining conflict and that war necessary entrenches gender inequality. Rather, it is the nature of the construction of gender hierarchies within the state that determines levels of conflict; specifically, the propagation of gender systems that promote 'masculine' characteristics of aggression or militarisation in one or both genders. In most states this does manifest as oppression of women, but to see the latter as a cause in itself is to mistake the origin of the phenomenon. Ideas of security and gender are co-constitutive, and states or groups adopt specific gender norms at least partially in response to their security situation, which can then have a reciprocal impact upon the latter in a mutually reinforcing, reflexive method.

Measuring comparative gender inequality is both problematic and controversial. There are, however, a few key indices that have gained relative acceptance. One is the Gender Inequality Index (GII), first introduced in the 2010 Human Development Report twentieth anniversary edition by the United Nations Development Programme

(UNDP).ⁱ Although it must be acknowledged that the GII cannot cover all aspects of inequality, it does give a fairly good representation of the overall level of inequality in a country. In the GII of 2018 (the most recent available year), Israel ranked number twenty-four out of 189 countries with a score of 0.100 (with ‘zero’ representing perfect equality and ‘one’ representing perfect inequality).¹⁴ An alternative index is the Global Gender Gap index, which ranked Israel sixty-four out of 153 states in 2020. This difference stems from the greater weight accorded to women’s participation in politics by the Global Gender Gap formula (explaining the presence of both Nicaragua and Rwanda in the top ten). While Israel scores near parity in education, health and many aspects of economic participation, low levels of female participation in politics substantially reduce its positioning in this index.¹⁵ Israel’s diverse ethnic and religious make-up obviously complicates any attempt to generalise women’s status in Israel and there is frequently a ‘sharp contrast between legislation on women’s equality and reality, between formal regulation and daily life’ for many women.¹⁶ However, this observation remains true for even the most gender-equal countries. The majority of international gender equality measurement systems rank Israel around the European average, a sufficient level of equality to render Israel one of the world’s ‘relatively gender-equal’ states.

Israel is also a country that can reasonably be characterised as experiencing high levels of conflict. As noted by Golan, ‘that Israel is a militarized society is not in question. As a society which since even its pre-state days has been involved in armed conflict (...) the central concern of the country has been “security”’.¹⁷ Since its establishment in 1948, Israel has fought eight recognised wars, two Palestinian intifadas, and a series of other armed conflicts within the broader Arab-Israeli dispute, meaning it has fought more wars than any other state since 1945.ⁱⁱ In the Global Peace Index 2019, Israel was ranked 146 out of 163 countries.¹⁸ This position is the result of improvements in its ranking over successive years from a lowest rank of 141 out of 144 countries in 2009.¹⁹ Though some have argued that Israel is simply a victim of a hostile environment, the reality is not quite so simple. Out of the eight wars Israel has fought since its birth, six were initiated by Israel. Moreover, consistent asymmetric casualty rates in all of these conflicts suggest that Israel is willing to use force far in excess of the force used against it.²⁰

i This index is a composite measure which captures the loss of achievement within a country due to gender inequality and uses three dimensions to do so: reproductive health, empowerment, and labour market participation.

ii The eight recognised wars are: The 1947-1949 Palestine War (War of Independence), Sinai War (1956), Six-Day War (1967), War of Attrition (1967-1970), Yom Kippur War 1973, First Lebanon War (1982-1985), Second Lebanon War (2006) and Operation Protective Edge (Gaza War) (2014). Of these, only the Palestinian War and the Yom Kippur War were not initiated by Israel.

When attempting to explain how it is possible that Israel is both 'relatively gender equal' and militarised—or even 'aggressive'—it is essential to return to the idea of gender. The understanding that gender is socially and culturally constructed necessitates the question of whom it has been constructed by. This is a question that has unfortunately often been ignored by many scholars of gender, who frequently appear to assume that gender is the product of seemingly agentless structures of power; or the male sex as a whole.²¹ However, like other cultural norms, ideas regarding gender do not simply arise from agentless processes of collective thought; they are conceived, developed, propagated, and disseminated by specific individuals in positions of power. The elites engaged in the creation and maintenance of gender hierarchies have agendas, motivations, and interests that are served by the ideas they promote. The nature of our modern constructions of gender would indicate some similarities between disparate motivations. Perhaps the most important of these is the need for security. In virtually every human culture, 'war exists in some form, as an ever-present potential that is realized at least occasionally'.²² The ever-present fear of war throughout history has meant security has always been a primary, if not *the* primary interest of political communities and their leaders.

The importance of security to gender construction is readily demonstrated by the extent to which war and militarism are gendered in almost all societies.²³ Most societies have experienced security concerns of a similar nature, including the threat of invasion by neighbours and the resultant need to defend their territory. In order to achieve security, therefore, political communities have generally required large populations and the ability to mobilise a substantial part of that population for war. Men and women's few biological differences were often key in determining the gendered division of labour in achieving these goals with women accorded the role of birthing the nation and men of defending it. Societies (and, later, states) were then faced with the task of constructing an understanding of gender that would mould men into the warriors they required them to be and women into the 'mothers of the nation'. Since killing in war 'does not come naturally for either gender (...) to help overcome soldiers' reluctance to fight, cultures developed gender roles that equated "manhood" with toughness under fire'.²⁴

The frequent exclusion of women from many armies, in spite of their ability to fight, can be explained by the requirement of the collective for the preservation of women of childbearing age. Moreover, in characterising women as vulnerable and in need of protection, some societies have found they were better able to mobilise men for war.²⁵ However, as identified by Laura Sjoberg, Caron Gentry, and Wendy Lower, the exclusion of women from war has been far from universal and there are many instances in which states have felt acute or unusual security threats that have necessitated breaking with traditional gender roles.²⁶

States have mobilised women for war more often than conventional wisdom would suggest. If one looks back to previous millennia, the participation of women in warfare was actually quite common. Indeed, it was asserted disparagingly by the Romans that Boudica, Queen of the Britons, had more women in her army than men.²⁷ Gravesites recently excavated in Russia contain the remains of women warriors from the second millennium B.C., with 'female skeletons buried with weapons and bearing wounds inflicted by similar weapons'.²⁸ Similarly, there is evidence that women participated in war in the nomadic steppe societies, meaning they were 'present at the creation of civilisational war,' even if they 'disappeared from cavalry as larger-scale military units formed and empires arose'.²⁹ The most substantial participation of women in combat in the modern era was probably in the Red Army of the Soviet Union during World War Two, when manpower shortages led to the drafting of female combatants. Official figures record that eight-hundred thousand women served in the army during World War Two, five-hundred thousand of them at the front.³⁰ Women also fought in World War One, again notably for Russia. Women have participated in guerrilla wars as well as revolutionary and resistance movements across the globe, including the Taiping Rebellion in China, in which there were reportedly all female units, as well as in mixed units in Spain, Vietnam, Nicaragua, South Africa, Iraq, Iran, Lebanon, Cyprus, South Africa, to name but a few.³¹

In cases where women have been mobilised for combat, the society or state in question has sought to reconstruct notions of gender to accommodate for this. One of the most well-documented cases of long-term mobilisation of female fighters was in the eighteenth and nineteenth century Kingdom of Dahomey in West Africa, where women were believed to comprise around a third of the standing army.³² Visitors at the time reported that the female warriors sung songs celebrating their transition from women to men when they became soldiers: 'as the blacksmith takes an iron bar and by fire changes its fashion, so we have changed our nature. We are no longer women, we are men.'³³ In the twentieth century, in times of war, images of women brandishing muscles and wearing overalls often replaced previous images of slim, petite women in both state propaganda and advertising. Even states which mobilised women just to fill spaces in the labour market left by men who had gone to the frontlines had to encourage women to conceive of themselves differently.

This paper would argue that these 'moments' of gender reconstruction at times of war are simply shifts in an ever-present relationship between security and gender. The overwhelming similarity of gender roles across historical and geographical space can be explained by the similarity in security threats and needs faced by most societies. However, in states or societies that have experienced unusual security

situations, particularly those where security threats have been acute, this has resulted in the construction of alternative or modified gender systems. In response to their security situations, therefore, *gender has been what states have made of it*.

Gender and Security in Israel

The state of Israel was born into a region deeply hostile to its conception.³⁴ By the time of the War of Independence, '30 years of the Jewish-Palestinian conflict had left a heritage of enmity and mistrust in its wake'.³⁵ Victory in the War of Independence was achieved at the cost of the lives of one in every hundred citizens. This, combined with the psychological legacy of the Holocaust, meant that the new state was convinced that further attacks were inevitable.³⁶ This fear was exacerbated by their demographic disadvantage; the Jews were heavily outnumbered by the Palestinians. At the beginning of the British mandate in 1919, Jews constituted approximately ten percent of the population of Palestine, and by 1939-40, they were still only thirty percent; 467,000 out of 1.528 million.³⁷ At the end of 1946, there were an estimated 1.269 million Arabs in Palestine, as opposed to only 608,000 Jews, a two-to-one ratio.³⁸ Israel's leaders also believed it lacked adequate strategic depth to be sufficiently secure. Although the Israeli army had managed to seize seventy-eight percent of the territory of the Palestine in the War of Independence, 'the slender reed of Israel the country – merely nine miles wide just north of Tel Aviv – was far less than what [David] Ben Gurion [the first Prime Minister of Israel] believed was needed to support a modern state'.³⁹

Responding to the security situation they found themselves in, the leaders of the *Yishuv* (the body of Jewish residents in the land of Palestine prior to the War of Independence), who then became the first leaders of the state of Israel, adopted three primary security policies. First, Israel would strive to become a military power, which would negotiate with the Arabs from a position of strength, the so-called 'Iron Wall' strategy, involving 'a massive military build-up based on mass conscription'.⁴⁰ Second, the state would develop its demographic strength. Over time, high population growth would increase available numbers of soldiers and begin to rebirth a nation which had lost millions of its people in the Holocaust. Third, Israel would seek to secure the support of the West, particularly the US, in the hope that powerful allies would come to Israel's aid should the Iron Wall strategy ever fail.ⁱⁱⁱ

iii Some have argued that this policy was built on the legacy of the Zionist movement. According to Avi Shlaim, from the beginning, 'the unstated assumption of Herzl and his successors was that the Zionist movement would achieve its goal not through an alliance with the local Palestinians but through an alliance with the dominant Great Power of the day'. Shlaim, *The Iron Wall*, p. 5.

Gender was constructed in Israel from the time of the *Yishuv* to the present day, in order to facilitate these three security goals. As required by its violent and extraordinary beginnings, the Israeli state created a nationalist ideology within which masculinities were constructed in much the same way as they have been in other militarised, nationalist states—as warrior citizens and defenders of the nation. However, the acute security threat facing Israel meant that women would be needed to fulfil multiple functions and, as such, a complex and often contradictory understanding of the female gender was developed. This was based upon the following pillars: first, the traditional role, of the ‘womb of the nation’; second, of the woman as Israeli soldier-citizen, charged with defending the nation; third, the international image of Israeli women—free and independent, ideological allies of the West in the Middle East.⁴¹ This tripartite construction served the three primary security policies of the state, with each taking prominence at particular times in history in response to shifts in the security environment and the needs of the state.

Mothers of the Nation

The first pillar of the tripartite construction of the Israeli woman is the most well documented within the existing literature, that of the ‘mother of the nation’. Throughout history, states have sought control over the wombs of their female citizens to ensure expansion of their populations and a plentiful supply of recruits for armies. Israel has not been an exception to this aspect of nation-building; both in the *Yishuv*, and later in the state of Israel, motherhood has defined women’s citizenship, and has at times been considered their most important contribution to the national collective.⁴²

Proactive policies of *Yishuv* leaders to increase the birth rate of the Jewish community in Palestine initially emerged in reaction to the Holocaust. As noted by Steinfeld, ‘[a]s news spread of the decimation of European Jewry, prominent leaders responded by emphasizing the importance of increasing Jewish childbirth’.⁴³ In 1943, the Chief Rabbi of Palestine, Yitzhak Halevi Herzog, called on Jewish families to ‘be fruitful and multiply, and replenish the earth’.⁴⁴ Shortly after the War of Independence, the state launched a number of practical policies in order to increase fertility rates. The first official fertility policy enacted by the state of Israel was the Birth Prizes scheme, or *prasei yeludah*, which was set up by Prime Minister Ben-Gurion on 19th July 1949.⁴⁵ The programme awarded one hundred liras, together with a letter signed by Ben-Gurion, to every woman on the birth of her tenth child. Other policies included maternity insurance, which covered the costs of hospitalisation during childbirth, and large families’ insurance, which gave state benefits to families on the basis of the number of children they had; emphasising that the role of the financial assistance was directly to

encourage childbirth rather than to alleviate poverty. The state also made few efforts to provide family planning or contraceptive services during this time.⁴⁶

The Israeli state sent normative messages to women about the value of motherhood and their role as Israeli women. Very early on in Israel's history, it became clear that maternity was defined by the state 'as women's primary responsibility to the common good'.⁴⁷ This message was disseminated through numerous propaganda organisations. In the pre-state years, parenting manuals were distributed by the Committee for Childbirth Problems which stated:

For our safety in the future we need to have a large population. These periods of war have taken valuable people from us. Our human reservoir in the Diaspora has declined, and if childbearing is always a crucial necessity, it is now even more crucial ... A woman's duty is different from a man's in this war.⁴⁸

The state's pro-natalist policies were often very explicitly security-oriented and many scholars document that this profoundly impacted societal notions surrounding childbirth and fertility. According to Judith Baumel, 'the extent to which the image of a mother as an instrument of national continuity entered the collective public consciousness may be seen by the common phrase used by midwives during the 1950's and 60's in order to inform new mothers of their child's sex ("congratulations, you have a 'chayal' (male soldier)"; "congratulations, you have a 'chayelet' (female soldier)".⁴⁹ Iconography of war memorials also frequently reifies the image of the mother bidding her son farewell as he heads to war, reminding women that this too is part of their national duty.⁵⁰

This pro-natalist strategy is not dissimilar to the one employed by the Palestinian leadership, notably to much greater success, during this period.⁵¹ The Arab-Jewish fertility differential peaked in the mid-1960s when the total fertility rate of the Arab population reached 9.23 while that of Jews remained at 3.39.⁵² It is during this time that scholars also see the peak in state messaging and policies designed to encourage women to have children. The war of 1967 further fuelled demographic anxiety by bringing roughly one million Palestinians under Israeli control, which had implications for the preservation of the Jewish majority within Israel's green line. Arab leaders like Yasser Arafat also stoked the demographic anxiety by referring to the wombs of the Palestinian women as their greatest weapon.⁵³ Golda Meir famously confided in the early 1970s that 'she was afraid of having to wake up every morning wondering how many Arab babies had been born during the night'.⁵⁴

Unsurprisingly, abortion in Israel occasionally emerged as a key issue of contention during this period, although the issue was arguably

less politically toxic than in other national contexts. What is interesting about the debates over abortion policy in Israel is how explicitly they were linked to questions of security. In January 1975, a vote was held on proposals to liberalise Israel's abortion laws. A former member of the Knesset, Marcia Freedman, recalled members of the Knesset shouting statements during the debate like 'tens of millions of Arabs, who are fruitful and multiply, surround our border', 'they destroy fetuses, souls, spirits of Israel's children which they are still in the mother's womb', '[h]as Arafat given his consent to this law?', and 'the Jewish people are being annihilated' during the debate.⁵⁵ The connections made by some legislators between abortion and the security threat posed by the Arabs suggests that opposition to abortion was not merely moral, but also based upon considerations of national security.

Many of the messages conveyed by anti-abortion political parties were tied to memories of the Holocaust. According to Nira Yuval-Davis, the Israeli government was keen to remind women that it was their 'duty' to replenish the stock of the Jewish race and women who failed in this duty were sometimes painted as traitors to the state.⁵⁶ For example, during the early 1980s Haim Sadan, the Minister of Health, advocated compelling all Jewish women requesting an abortion to watch a slide show of images of dead fetuses alongside murdered Jewish children in Nazi concentration camps.⁵⁷ However, there were many within Israel who supported more liberal abortion policies, both from a public health and a gender equality perspective. There was also a widespread acceptance of abortion in the case of foetal abnormality within many segments of Israeli society.⁵⁸ The state's solution to the presence of irreconcilable views on this matter at both the political and societal level has been to ensure that abortion was in practice, widely available, while in principle, remained legally restricted.⁵⁹

Women's conscription to solving the 'demographic problem' constituted a centrepiece of Israeli gendered discourse from the days of the *Yishuv*.⁶⁰ What it meant to be a woman in early Israel was inextricably bound with maternity. State propaganda actively 'maternalised' women's roles within society, portraying them as 'mothers of the nation'. Proximity to the Holocaust, successful competitor birthing strategies by the Arab population, and territorial gains of Arab majority areas all accentuated fertility-related demographic anxiety. Conversely, temporal distance, reduced Arab birth rates, and territorial stability has alleviated it over time, allowing for the emphasis on women's demographic duty to be relaxed.⁶¹ The intensity of state-led pro-natalist activity has fluctuated over time in response to these changes and has come under increasing competition from alternative framings of gender, as will be discussed below.

The second pillar of the tripartite construction of the Israeli woman is that of the *soldier-citizen*. Israel is currently the only country in the world where military service is obligatory for both men and women, albeit in a highly gendered manner.^{iv} The relationship of women to the armed forces in Israel has undergone a dramatic evolution in the short history of the state, from participation in direct combat in the pre-state revolutionary fighting units such as the *Haganah* and the *Irgun*, to one of highly gendered and unequal participation through the fifties, sixties and seventies, and finally a gradual regaining of women's access to combat roles and moves to equalise participation over the last few decades. This evolution has taken place in conjunction with the evolving security needs of the state and the women-led campaign for greater equality within the military.

Israeli women's role as soldier-citizens originated prior to the birth of the state. The number of women who took part in armed combat in the years before the declaration of independence is disputed. However, no scholar denies they formed a substantial part of all organisations. In the *Haganah*, the largest and most concentrated military organisation of the *Yishuv*, women played a considerable role. Although the proportion of women in the earliest years of the *Haganah* (during the twenties) is believed to have been as low as five percent, by the later years, it has been suggested that women formed thirty percent of the *Palmach*, its elite fighting force.⁶² Women were also members of underground resistance groups such as the *Irgun* and the *Lechi*.⁶³ The historical record also suggests that women's contributions during this time were not as gendered as one might expect. According to Amos Lev, 'in the period of the *Haganah* there were joint units of men and women. In the expeditions to the Negev and Massada girls participated like men'.⁶⁴

Leading up to the Declaration of Independence, the *Yishuv* began to prepare for war. On 5 December 1947, conscription was instituted for all men and women aged between seventeen and twenty-five. Less than two weeks after Israel's declaration as an independent state on 14 May, Prime Minister Ben Gurion officially created the IDF. In the early months of the War of Independence, a considerable number of women fought as soldiers within the IDF. According to Martin Creveld, in 1948, 10.6% of the armed forces were women.⁶⁵ However, the War of Independence was the last war in which women actively participated in battle until 2000, when women once again became eligible to undertake combat roles. After a female soldier's body was mutilated near Kibbutz Gevulot early

iv Other states which practice a limited form of conscription for women are Benin, Chad, Cuba, Eritrea, Libya, Malaysia, North Korea, Taiwan, and Tunisia. However, in practice, very few women are ever conscripted in these countries and none into combat roles.

in the war, the Israeli High Command decided to remove women soldiers from the front lines and forbid them from participating in future battles. Following this incident, women were immediately removed from combat units and sent to rear units, serving as clerical personnel, providing medical assistance, and conducting other auxiliary functions.⁶⁶ As a result, according to Baumel, during the War of Independence only 137 women soldiers were killed.⁶⁷ There were also many tasks besides fighting which the army was responsible for, tasks which the women's corps could be directed to carry out, such as managing the large-scale Jewish immigration. Women were therefore 'encouraged to undertake social work among immigrants, to settle them into their new surroundings, and to accustom them to their new environment'.⁶⁸

The IDF began to redefine women's role in the army away from combat and into more traditional caregiving roles from this point. This process in many ways mirrors the historical accounts of many nationalist movements in which women's direct participation was welcomed when manpower was short, only for women to become excluded from political and organisational decision-making when the fighting stopped. In fact, the 1950s and 1960s were marked by regression in gender equality on almost all fronts. According to Naomi Chazan, '[w]omen's integration into the labour market dropped from 30% to 25% during Israel's first decade... Even in the socialist kibbutzim, women found themselves back in the kitchen and the nurseries'.⁶⁹ Female representation diminished from fifteen percent in the Representative Assembly of the Yishuv to an average of eight percent in the Knesset throughout 1960s.⁷⁰ It is this period which tends to dominate existing feminist texts on militarisation and gender in Israel. Scholars such as Golan directly link women's inequality in Israel with their inequality in the military project from the beginning of the state, arguing that the 'central and socializing institution of the military is the quintessence of a patriarchal institution, reinforcing and perpetuating the stereotypical role of women as subordinate, subservient and superfluous'.⁷¹

However, while it is true that during this period women's role certainly became secondary within the armed forces, the decision was nonetheless made to maintain compulsory conscription for women as well as men, a move that was rarely made in other comparable contexts. On 8 September 1949, several months after the War of Independence had finished, the Knesset passed the National Defence Law, which stated that any person of military age (in the case of a male person, any age from eighteen to forty-nine years inclusive; in the case of a female person, any age from eighteen to thirty-four years inclusive) may be called upon to serve in the armed forces. Initially, women and men were to serve the same length of time, although women were to be barred from combat

status.^v The plan to enlist women was met with substantial resistance from the Orthodox and more traditional communities. The Knesset debates on the subject were fierce and pitted the religious conservatives against the more secular elements. When justifying the decision to the Chief Rabbi, Ben-Gurion wrote that:

Since you rightly believe that the security of the state must be pursued night and day, I want you to know that that security will not exist if our nation's women do not know how to fight. We are few – and our enemies are many. If, heaven forbid, a war falls upon us, the men will go to fight the enemy, and if, heaven forbid, the women who are protecting their children at home do not know how to use a weapon – what will be their end if the enemy falls upon them?⁷²

It is clear, therefore, that this was a decision taken on the basis of the nation's security and it had significant implications for how gender hierarchies were constructed within the new state. In maintaining a form of military conscription for women, the state of Israel made clear that women had additional roles to play in the defence of the country *other* than bearing children. Over time, this message permeated into the culture of Israeli society. When interviewing female soldiers of the IDF, many said that they believed that it was equally important for a woman to serve in the IDF as a man and that this was also the view of their parents. One former female IDF soldier stated that:

In my family, it was always considered essential to do military service. That was the same for me and my brothers...there was no difference, my father is still disappointed I never became an officer.⁷³

This sentiment was echoed in other interviews, with almost all subjects saying that they believed their participation in military service was as important and meaningful—both to them personally and to the state—as it was for their male colleagues. The feelings articulated by these women appear to challenge some of the assumptions by scholars like Golan, who argue that the gendered nature of military service rendered a fundamental inequality between the status of men's and women's military contributions. Baumel also makes the interesting point that 'for several decades collective public memory retained the original image of the fighting woman soldier'.⁷⁴ Memorials for fallen soldiers in the War of

^v Pregnant and married women were exempt, as were Orthodox women—the latter being a concession to the Orthodox communities which were deeply opposed to the law. Also exempt were Orthodox Yehuda students.

Independence were unusual (in a global context) in that, not only were many built to commemorate fallen women, but those that were often bore a representation of a woman.⁷⁵ This breaks an international trend of war memorialisation that almost universally omits representations of female fighters. As noted by Edna Lomsky-Feder and Orna Sasson-Levy, the struggle to achieve independence is often associated with the struggle to acquire masculinity and this is commemorated by nations through the use of masculine images.⁷⁶ This presence of the female figure in war memorials is important since, 'in the deepest sense, the choice of who gets remembered and what gets memorialised is in every culture, inevitably, ideological, and is crucial to the nationalism that gets constructed'.⁷⁷ That said, there are also visible examples of women's exclusion from the public discussion around military issues. For example, Golan noted that when Peace Now, Israel's first mass peace movement, was created in 1978 through the signing of an open letter by 148 soldiers and reserve officers, the group 'refused to include the signature of the one woman among the initiators'.⁷⁸ It is not the case therefore that women's military participation was as celebrated or prominent as men's within Israeli culture; but what is unusual about the Israeli case is that women's exclusion was not universal or total, as it was in many other national contexts.

The IDF has also been, throughout Israel's history, a key battleground in the fight for gender equality, much more so than in the majority of national contexts. In 1995, the Alice Millar case paved the way for women to be allowed to take the pilot's exam. A further breakthrough on the issue of women in combat positions, or at least combat-like positions, was achieved early in 1996 when women were recruited to the Border Guard. In 2000, the law regulating national security service was amended to allow women to serve in all military positions. This led to the opening of ninety percent of all positions to women and ten percent of combat positions.⁷⁹ According to scholars such as Golan, women in the IDF 'are still found primarily in clerical or support positions as distinct from combat positions, and, more importantly, they are viewed as "weaker"; they are subject to sexual harassment, and, for those who remain in the professional army, they experience discrimination in promotions'.⁸⁰ While this is true, the number of women in combat positions is growing. The first mixed-gender unit, Caracal, was established in 2004. Service lengths of men (three years) and women (two years) remain unequal, but many women are choosing to serve longer terms, training for most positions is now done jointly, and the total number of women combat soldiers has increased sevenfold since 2005.⁸¹

In a recent study of the impact of service in combat roles on female IDF recruits, Ayelet Harel-Shalev and Shir Daphna-Tekoah found that women combatants in the IDF describe a similar experience of gender shift as that detailed in other contexts of female military

participation such as Dahomey; that they became 'men' or 'masculine' through their combat experience. Many of their interviewees 'grappled with the question of their gendered identity as combatants'.⁸² They also found that 'all the interviewees acknowledged that the system demanded that they become more masculine. Most expressed a certain tension between the desire to meet this expectation on the one hand, and a resistance to it on the other'.⁸³ Former IDF soldiers interviewed for this project expressed some similar views to these, including the requirement to develop perceivably 'masculine' characteristics during service. However, when probed on what these characteristics entailed, words such as 'competence', 'leadership', and 'resilience' were used much more often than words which denoted physical strength, aggression, or toughness.

As may be expected, women's experience of the IDF and its gendered implications remains extremely varied. Harel-Shalev and Daphna-Tekoah's work shows combat to be key to experiences of masculinisation and the responses of women they interviewed who were in combat roles were very different to those in administrative roles. This finding corresponds with other recent studies in these matters. Lomsky-Feder and Sasson-Levy, for example, illustrate the drastic differences between the experiences of women soldiers serving in IDF roles that are traditionally regarded as feminine, such as secretaries and administrators, and those of women in 'masculine' roles, such as combat soldiers or commanders.⁸⁴ These findings lead Harel-Shalev and Daphna-Tekoah to reject prevailing binary perspectives of women's military participation as either co-optation by a patriarchal institution or a mechanism for social mobilisation, and instead argue that the military constitutes a gender 'inequality regime' with both opportunities and obstacles for different intersectional groups, thereby generating diverse encounters with the state.⁸⁵

The debate over women's role in the IDF is far from over and is now being reignited through the entrance of increasing numbers of Orthodox men and women into the army whose strict religious codes prohibits close association between unrelated individuals of the opposite sex. Shortly after the amendment to the law regulating national service in 2000, the IDF issued the Proper Integration Ordinance of 2002, a series of measures designed to ensure that women's increased military participation did not impinge upon Orthodox conscripts' desire for gender segregation. It set the rules for separate living quarters and modesty restrictions, while also stipulating that soldiers had the right to refrain from activities which required gender mixing. This resulted in a steady stream of complaints from female soldiers that the order was being interpreted in ways that amounted to discrimination. As a result, the order was suspended. Following a lengthy review process, a revised Joint Service Ordinance was published in December 2017. The

Joint Service Ordinance provides for some, more limited, options for Orthodox conscripts to uphold gender segregation during their period of service. The principles of the Ordinance remain contentious with Orthodox leaders and feminist campaigners both feeling that too much ground has been given to the other side.

The military has played a profound role in the construction of gender within Israel, as it has in many national contexts. As noted by Lomsky-Feder and Sasson-Levy, the military is 'one of the main arenas for civic participation, since it is the institution most closely identified with the state, both in its ideologies and its practices'.⁸⁶ It is for this reason that they conceptualise the military as a 'contact zone; where the citizen and the state meet'.⁸⁷ Through mandating female conscription—albeit in a highly gendered way—Israeli women's contact with the state was not only as 'mothers of the nation' but also as 'soldier citizens'. Over time, women have fought for an expansion of their soldier-citizen role and an equalising of their status with men within this key state institution. The military has indeed played a role in enforcing gender inequality, as noted by Golan, but it has also provided a key forum for the fight for equality and for the creation of alternative constructions of gender.

Image of the Nation

The last pillar of the state's construction of the 'Israeli Woman' was that which featured prominently in the state's international media profile: the liberated woman of the Middle East and an ally of the West. As detailed by scholars such as Avi Shlaim, from very early on in the Zionist project, the leaders of the movement were conscious that international support would likely be key to the achievement of their project, and this belief was also held by early leaders of the Israeli state.⁸⁸ Many commentators have remarked upon the unique way in which Israel has, since its establishment, developed international 'friendships' that go beyond mutual interest and are built on deep ideological affinity.⁸⁹ This paper would suggest that there has been a gender element to the international 'friendships' developed by Israel. An examination of the gendered imagery used in pro-Israeli propaganda highlights the role of women in this aspect of Israeli foreign policy.

Sharoni argues that two popular images have shaped the way women in Israel are viewed: one is 'the tough, powerful, and exceedingly unfeminine Golda Meir, the former Israeli Prime Minister'.⁹⁰ The other is the 'exotic woman soldier, in military fatigues with a machine gun slung over her shoulder, ready to fight for her country'.⁹¹ Images of the Israeli female soldier continued to be widely disseminated abroad even when women's roles in the IDF were sharply curtailed and at a time when the state was attempting to redefine women's roles away from that of the 'fighter' and towards being 'wombs of the nation'. According to Sharoni,

On the one hand, (...) images of attractive, exotic, young Israeli women in military uniform with machine guns slung over their shoulders have been systematically deployed in Israeli public relations campaigns to emphasize the seriousness of the continual threat to Israel's national security.⁹² On the other, 'women's participation in the military was also presented as proof of the modern and democratic character of Israel. This image of the allegedly liberated, modern Israeli woman soldier was then contrasted with images of veiled, powerless Arab women in order to depict the neighbouring Arab countries as undemocratic and culturally backward, thus demonstrating Israel's role as an outpost of the West'.⁹³

To a large extent, these images that Israel portrayed abroad were a reflection of its own vision of itself as a young, dynamic, and progressive nation. They also bear echoes of the predominantly masculine-focused social and cultural concept of the 'new Jew'. Zionism, as a political project, was not merely about the construction of a Jewish homeland in Palestine. Rather, from the beginning, 'the idea that stood behind Zionism was the transformation of the social, political, economic and psychological profile of the Jews in Europe, the creation of a *New Jew*, a *Muscle Jew*, who would be the antithesis of the pejoratively "feminised" Diaspora Jew'.⁹⁴ During the days of the Yishuv, native Palestinian Jews termed themselves *Sabras*, after the cactus plants in Palestine—an allegory for their tough exterior, developed in the harsh conditions of Arab-dominated Palestine. As European-born Jews migrated to Palestine, the myths of national imaginings suggested that they too became *Sabras*.⁹⁵ Thus, in fighting for national emancipation, many Jews, like those of other newly independent nations, conceived their emancipation in a gendered way—with notions of independence and masculinity inextricably linked.⁹⁶

What being a 'New Jew' meant for women was less clear, but the female gender was not untouched by this cultural movement; with many of the core elements that formed part of the masculine 're-birth' either claimed by Israeli women or ascribed to them, both by political and ideological leaders of the Yishuv and the wider Zionist movement, and later by the state of Israel. Julie Grimmeisen argues that women were actually presented with two mutually exclusive and competing images of ideal womanhood in the early years of the state: the *Halutzah* (female proletarian and field worker) and the beauty queen. While the image of the *Halutzah* celebrated women's equal participation in the hard

labour required to build the new state (and links with the portrayal of female soldiers), the beauty pageants were a symbol of Israel's inherent Western-ness. According to Grimmeisen, the beauty competition participants 'can be seen as symbolic bearers of the national body and at the same time as agents of the Israeli attempt to adapt to Western standards and the commodification of the female beauty'.⁹⁷ She argues that this is demonstrated in the manner in which the participants of the first pageant were described in Israeli media, as being of the same 'proportions' as international beauty standards, and by the coronation of the first winner by Miss Europe, thereby welcoming Israel's beauty queens into the Western family.⁹⁸ For Grimmeisen, these ideals existed 'side by side to offer women (and men) a vision of female participation in the Israeli national enterprise'.⁹⁹ Inbal Ben-Asher Gitler, in his study of depictions of difference and diversity in Israeli posters during the early years of the state, finds similarly competing images of femininity, in contrast to a more uniform depiction of ideal Israeli masculinity. While some state posters depicted strength and equality of participation in the state building project (particularly in the agrarian field), others stressed women's femininity and beauty.¹⁰⁰

The winners of Israel's beauty competitions were often used as national ambassadors for Israel, undertaking international tours to meet with politicians and Israeli friendship groups.¹⁰¹ They simultaneously undertook diplomatic missions while acting as a living image of Israel's affinity with the West. The use of women in international propaganda remains commonplace. The headline video of the 2018 Visit Israel campaign, sponsored by the Ministry of Tourism, featured only women—specifically, modern, liberated (and scantily clad) women.¹⁰² That Israeli women are instrumentalised to convey messages about the state internationally has also, on occasion, been explicitly stated by Israeli Foreign Service officials. In 2007, David Saranga, the consul for media and public affairs at Israel's consulate in New York, spoke to the *Jerusalem Post* about a photo shoot organised by Israel's Ministry of Foreign Affairs and the American-Israel Friendship League for *Maxim*, the US's leading men's lifestyle magazine. He explained that the scantily clad female Israeli models were to be a 'Trojan horse' to portray Israel as a modern, diverse country.¹⁰³

The leaders of Israel set out, from the beginning, to manufacture a social, cultural, and ideological affinity with the West (primarily the US); cultivating a mutual identity to be pitted against their mutual 'other', the Arabs. This enterprise was successful insofar as, over time, 'Jews and Israelis came to be seen as insiders to the extent that they were shown to possess history, ideals, behaviour, and physical attributes in common with the image of most Americans'.¹⁰⁴ Women were—and remain—an essential part of this project. Their instrumentalisation within it has also interacted in complex ways with ongoing debates about

the role of women in the nation-building project. In cultivating an image of Israeli women as free and liberated, the state has engrained that image within the national consciousness, further mitigating the effect of other messages which sought to maternalise or traditionalise women's role in society.

The Gender – Security Nexus

Altogether, a close examination of the various roles women have played in the state-building project of Israel suggests that the gender landscape of the country is considerably more complex than most scholars allow. While women's position as 'mothers of the nation' has undoubtedly been fundamental, this has not been their only role within Israeli society. They have also been called upon to be soldier-citizens and to display the necessary characteristics of toughness, resilience, and courage when the security needs of the state demanded it. In addition, the particular idea of the 'new' Israeli woman as free, liberated, and beautiful was often utilised by the state in the context of the development of its international friendships as a visual demonstration of ideological affinity. Women's role within the nation of Israel has therefore been a convoluted and sometimes confusing one, wherein women were encouraged to adopt multiple identities in order to further the state's goals.

In many instances, the different elements of gender construction have served to undermine each other. For instance, although Ben-Gurion initially declared women's full military participation to be imperative to the security of the state and the success of the national project, this concern was overtaken by later demography-based security considerations. As Israel's military strength grew over the 1950s and 1960s, the foremost security threat slowly morphed from one of military defeat to one of demographic outnumbering. Women were therefore perceived as needed more for their reproductive abilities than for their military participation, resulting in a propagation of more traditionally feminine and maternal functions for Israeli women and a curtailment of their soldier-citizen role.¹⁰⁵ However, women's continual participation in the military, albeit in a highly gendered manner, and the instrumentalisation of notions of gender equality by state elites has meant that this 'maternalisation' project was never quite fulfilled. Through their continued participation in the military, women maintained a key element of the soldier-citizen role and the process in which women were re-domesticised in so many other post-revolutionary contexts never fully succeeded in Israel. Women therefore continued to play a participatory role in the militarisation and wider state-building project over a prolonged period of time. They were also able (and in many ways compelled) to use the IDF as a key battleground for equality in a way that has not occurred in other comparable contexts.

The sustained presence of women in the military and the

prominence of the military in the fight for gender equality has led to a more nuanced relationship between gender hierarchies and processes of militarisation than that currently presented in the literature. The tension between women's different roles in the state building project has also played out in the competing images of Israeli womanhood that the state has sought to project, both internally and externally. Notions of Israeli womanhood that were instrumentalised for an international audience have helped further existing egalitarian principles within Israel, pushing back against conservative or maternalising agendas.

Acknowledging that gender hierarchy is a socio-political ordering principle, feminist scholars have argued that the adoption of rigid gender hierarchies where masculine characteristics are highly prized leads to the development of societal norms which legitimise and valorise aggression.¹⁰⁶ However, the place of specific individuals upon a gender hierarchy is extrinsic to the social construct of the hierarchy itself. This paper posits that in the case of Israel, the leaders of the state have constructed a highly masculinised gender hierarchy where masculine characteristics are highly prized, but women are provided with greater opportunities to access positions within the 'masculine' apex of the hierarchy than is typical in other national contexts. This assertion finds evidence in women's lived experience of the IDF. As found by Harel-Shalev and Daphna-Tekoah, women who participated in the most 'masculine' roles in the IDF, particularly combat roles, felt that they had gained status from the role while simultaneously experiencing some form of gender shift.¹⁰⁷

The Reflexive Impact of Gender Constructions on State Security Policies

How the participation of women in the IDF has impacted Israel as a society and a state is difficult to establish, there being no counterfactual against which to measure social trends. However, there is some evidence that women's participation in the military project may have led to overall higher support within society for hawkish positions on security through closing the gender gap in support for such policies. Surveys of public opinion in the vast majority of national contexts have generally found a gender gap in support for wars or other aggressive policies, which varies according to the state and the conflict in question, but which J. Ann Tickner finds is usually around seven to nine percent.¹⁰⁸ Interestingly, examination of gender-disaggregated opinion polls suggests that this gap is frequently smaller or non-existent in Israel.

The Peace Index is an on-going public opinion survey project directed by Professor Ephraim Ya'ar of Tel Aviv University, and Professor Tamar Hermann of the Israel Democracy Institute. It is composed of twenty-three indicators, ranging from a nation's level of military expenditure to its relations with neighbouring countries and the level

of respect for human rights. The index aims to systematically follow the common public opinion trends in Israel concerning the Israeli-Arab/Palestinian conflict and its impact on Israeli society. This paper has utilised the data from these surveys over multiple years in order to ascertain whether a gender gap may be detected in support for aggressive state policies. This paper selected a sample of six years from the main Peace Index in order to search for a gender gap in support for the peace process. It also looked for a gender gap in support for the 2006 Lebanon War, 2008 Operation Cast Lead, and 2012 Operation Pillar of Defence.^{vi}

The data examines three areas: support for wars, support for the peace process, and flexibility in negotiations. When asked whether they supported Operation Pillar of Defence in November 2012, 81.7% of women said they did, compared to 81.1% of men. In 2008, when asked if they supported Operation Cast Lead, 80.9% of women said they did, as did 82.9% of men. When asked if the air attack on Gaza was justified or not justified, in light of the fact that it caused damage to the infrastructure and suffering to the civilian population of the strip, 61.7% of women said it was 'very justified', as did 63.7% of men. This demonstrates a very low gender gap with regard to aggressive policies towards Gaza. More of a gender gap was noticeable in 2006 regarding the attack on Lebanon wherein 81.1% of women argued that it was justified compared to 86.9% of men.

When examining the responses to questions on support for the peace process over the years, it is clear that, when a gender gap arises, it is small, hovering between one and three percent, and in some cases, does not exist at all. In some of the surveys, women are more opposed to the peace process than men. Taking the average over the six years; 20.7% of women say they oppose the peace process along with 21.8% of men. Women's opinions also correlated with those of men regarding the erection of the security wall with 63.2% of women saying they supported the idea 'a lot' and 63.3% of men saying the same. Women also appear similarly inflexible in negotiations; when asked in 2003 about their level of support for signing a full peace agreement with Syria in exchange for full withdrawal from the Golan Heights, overall, 56.9% of women said

vi The data was provided by the Guttman Center under the auspices of the Israel Democracy Institute (R.A.) The data is taken from Israel Peace Index surveys in July 1996, July 1999, July 2003, July 2006, December 2008, and November 2012. These particular datasets were chosen on the basis of a) providing an extended time frame over which to measure trends (no statistically significant shift in gender gaps occurred over the time frame); b) the relevance of questions asked by those particular surveys to the subject of the paper (while there are some standing questions asked by the surveys, many vary by month) and; c) the July 2006, December 2008, and November 2012 surveys canvassed public opinion at the time of the Second Lebanon War, Operation Cast Lead, and Operation Pillar of Defence, respectively. Unless specified otherwise, all figures relate to the averaged available data across the six years sampled.

they did not support this deal, along with 55.4% of men. Women also expressed similar views to men regarding the release of prisoners who were believed to be members of terrorist organisations, with 41.8% of women not prepared for Israel to release prisoners associated with Islamic organisations like Hamas and Islamic Jihad in order to maintain the armistice along with 38.3% of men.

These findings accord with some of the recent findings of Michal Shamir, whose scope of study is greater and based upon Israeli election poll data. Shamir and her co-authors found that 'women were more captivated by the security agenda and expressed more hawkish attitudes than men about increasing the defence budget, expressing consent to the establishment of a Palestinian state and evacuating settlements'.¹⁰⁹ They also accord with some of Golan's later studies investigating this question. In an study in the early 1980s, Golan found women 'slightly more willing than men to compromise and negotiate rather than employ the use of force [and that] men scored somewhat higher than women on what might be called a scale of militarization (hawkishness)'.¹¹⁰ However in a second survey conducted in the late 1980s, Golan 'found virtually no differences in attitudes between Israeli men and women on the same or similar questions'.¹¹¹

These findings are far from conclusive and many other studies have disputed the existence of a universal gender gap in support for war, meaning its absence in the Israeli case may not be unique. Moreover, it is certainly not possible to say that any causal relationship between the conscription of women and the generally observed absence of a gender gap in support for war has been established. However, these findings do raise interesting questions. It is possible that the lack of a gender gap in Israel may be explicable by women's greater exposure to the militarisation project: if women are encouraged to be peaceful and compromising while men are encouraged to be aggressive and think in terms of honour and valour, it is unsurprising that the two genders will adopt a slightly different approach to policies of war. If, however, women also undergo a process of socialisation within the military and are encouraged to conceive of war in similar terms to their male counterparts, it is foreseeable that their opinions regarding war will show greater similarity with those of men. This assertion gains some credibility from the observation that female leaders—who are necessarily socialised in masculine environments—have rarely proven more dovish than men.

The lack of a gender gap in support for wars may therefore shed further light on Israel's outlier status. In countries which are gender equal, democratic, and in which there exists a gender gap for war, women's equality could be increasing the number of pacifist voices in the electorate. If women were excluded (as they are in gender-unequal countries), the position of the electorate would then be moderately more belligerent. In Israel, however, the lack of a significant gender gap may

mean that women's participation in politics has less of a pacifying effect upon overall policy.

Conclusions

This study has demonstrated that security considerations played a large part, both directly and indirectly, in determining the contours of masculinities and femininities within the *Yishuv*, and later, the state of Israel. Not only do the constructions of gender within Israel correspond to the security needs of the state, but there is substantial evidence to indicate that the state's involvement in the creation and manipulation of gender was based upon these security needs. The case of Israel therefore demonstrates that security is an important factor in deciding the contours of gender construction within states. It also shows that 'state making is a dialectical – rather than uniform – process' in which competing voices struggle to ensure the dominance of their vision of the nation.¹¹² This struggle was highly visible in the early years of Israel's existence between the Orthodox communities and the secular Zionists who had very different conceptions of the kind of nation Israel should be and what kind of role women should play within it. Women too were a fundamental part of this struggle, evidenced by their fight to be included in the nation-building project in particular ways, both before and after the creation of Israel.

This study has also offered a suggestion that the particular construction of gender in Israel, notably of a 'militarized, egalitarian femininity', could explain Israel's deviation from the predictions of second-wave, positivist Feminist theory. If true, this would mean that while there is observed correlation between the oppression of women and state belligerence, the causal mechanism is not the oppression of women, but the elevation of masculine norms of aggression. In most cases, the promotion of 'masculine' ideals 'causes' both oppression of women and state belligerence. In Israel, however, the promotion of 'masculine' ideals has likely influenced state belligerence, but its impact upon women's status in society has been nuanced. Women in Israel could be conceived as having been 'lifted' up several notches on the gender hierarchy through the 'masculinisation' of their roles within the state-building project.

Israel is not the only outlier identified regarding this relationship. Countries such as Libya and Russia also experience higher levels of conflict than their level of gender equality would suggest. Similarly, some vastly unequal counties such as Qatar experience very low levels of conflict. In order to truly test some of the above assertions, an analysis of these other outliers would also be required. However, the Israel case is useful in developing key questions and insights to inform a larger project.

Noting these qualifications, the initial findings presented in this paper in the Israeli case would suggest that the argument that ‘the roots of conflict and insecurity for states [are] the treatment of females within society’ is flawed and requires nuance.¹¹³ They would also indicate that many policy prescriptions should be revised if they are to be effective. Many international organisations currently articulate the belief that women’s equality will further the interests of peace. While this may often be true, it may only be so in a context where the socially constructed ‘feminine’ characteristics of compromise and passivity are welcomed into the public sphere. If women are merely elevated within structures that promote ‘masculine’ characteristics, their inclusion may have little impact upon possibilities for peace. Although countries with more women in power are in general more peaceful, that may not be because of the influence of pacific women per se, but because both the inclusion of women and policies of peace have been promoted by specific ideologies and constructions of gender within those states.

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THE QUEEN IN THE NORTH: CONCEPTUALISING INTERNATIONAL RELATIONS, POPULAR CULTURE, GENDER, AND HOW FEMININE POWER WON THE GAME OF THRONES

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Abstract

This article contributes to existing literature on the connections between gender, International Relations, power, and Game of Thrones. Scholars have demonstrated that there is a clear relationship between power, gender and political authority. Politics and world pop culture relate to one another. The arts have been indicated as being a catalyst for societal change, showing that some forms of fictional and factual politics have a relationship with one another. This article uses existing scholarship on the gendered dimensions of political power in International Relations to show that Sansa Stark won Game of Thrones by repeatedly rejecting masculine power. Instead, Sansa adopts a policy rooted in feminine power (letter-writing, collaboration, patience and strategy) that win The Battle of the Bastards, and, ultimately, the North's independence. By doing so, this article shows that the coronation of Sansa Stark represents the triumph of feminine-coded power and policy, and that the rise of such power in the fictional world of Westeros can be mapped onto the non-fictional political world in a number of different examples. In our real world, Sansa's non-fictional counterparts stand out in stark contrast to a political landscape littered with political 'strongmen', who could be read as sabre-rattling pseudo-Targaryens.

Introduction

This article argues that policy and power gendered or coded as feminine won *Game of Thrones* via the coronation of Queen Sansa Stark; this can be connected to the non-fictional political world through politicians who lead without resorting to masculine codified traits of leadership or power.¹ The majority of society often learns about global politics not from formal teaching (such as an International Relations course) but from news media and popular culture.² Television series such as *Game of Thrones* are consumed by more individuals globally than the

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American Journal of Political Science and thus, as Ronnie Olesker notes, testing International Relations (IR) theories by utilising popular culture adds socially-constructed texts to our understanding of real-world politics.³ Jack Holland argued that ‘*Game of Thrones* is (nearly) everyone’s “favourite political analogy”’.⁴ Daniel Drezner describes Westeros as a ‘zero-sum’, ‘harsh relative gains world’, riddled with ‘realpolitik’.⁵ George R.R. Martin, the author of the books from which *Game of Thrones* is derived, notes that his fictional world is constructed from the real politics of the Middle Ages, the Crusades, the War of the Roses, and the Hundred Years’ War.⁶ And, as Holland notes, this may be why political theories developed by Niccolò Machiavelli and Thomas Hobbes are applicable to Westeros. Martin has also compared President Trump to a ‘grownup King Joffrey [Lannister]’, demonstrating how popular culture might help us make sense of the world, including female leadership.⁷ There is an abundance of academic work on the use of the arts as a catalyst for societal change that exceeds the scope of this article, but it is nonetheless clear that some forms of fictional and factual politics have a relationship with one another.⁸ *Game of Thrones* has been the subject of multiple scholarly studies, considering aspects ranging from fan phenomena to geopolitics.⁹

This article supports and builds upon the work of William Clapton and Laura J. Shepherd on Daenerys, concentrating on Sansa Stark to undertake a close reading of her as the winner of *Game of Thrones* and to examine female leaders in the real world. My argument expands upon Clapton and Shepherd’s thesis of *Game of Thrones* as a vernacular IR text, while supporting their use of the series as a way to unpack thinking in IR. My article is also an extension of Holland’s 2019 work on how pop culture and world politics relate to one another.¹⁰ Finally, in addressing whiteness, I am also broadening the scope of Clapton and Shepherd’s work, who mention race only once.¹¹

Clapton and Shepherd connect *Game of Thrones* to how people learn about gender and power, highlighting ‘the disciplinary positioning of feminist scholarship’ and ‘the marginalisation of feminist knowledge about power and authority’.¹² They suggest that the real-world relationships between gender, state power, and masculinity are part of IR, and that Westeros may allow both scholars and students of IR to ‘make different connections between political practices’, producing ‘different kinds of knowledge in and about I/international R/relations’.¹³ They also argue that the relationship between gender and power is clear, and that the show is a valid visual representation of ‘gendered dimensions of the exercise of power and political authority that generally is not captured within the major IR textbooks’.¹⁴ In early series, Clapton and Shepherd posited that ‘war is represented as the exclusive province of men’.¹⁵ Men are visible political actors, making strategic and political decisions and exercising authority.¹⁶ In the beginning of the final series of *Game of*

Thrones, power has a distinctly feminine face: both the current ruler of Westeros (Cersei Lannister) and the claimant to the throne (Daenerys Targaryen) are women.¹⁷ Female characters such as Daenerys Targaryen, Arya Stark, and Brienne of Tarth are also featured in battle scenes, raining down destruction as effectively as any of their male counterparts. But this representation of war fails to acknowledge players such as Sansa, who often combines her visibility as a public actor with subtler work behind the scenes.

Sansa Stark represents the triumph of feminine-coded power and policy, and the rise of such power in the fictional world of Westeros can be mapped onto the non-fictional political world, standing out against a political landscape littered with 'strongmen' who could be read as sabre-rattling pseudo-Targaryens. For example, the Prime Minister of Finland Sanna Marin took time to become established in the political world, beginning her political career at age twenty (Johanna Kantola noted that Marin 'doesn't come out of nowhere').¹⁸ This is comparable to Sansa as a well-established political player in Westeros at the beginning of Series Eight. Like Sansa, Marin took on a leadership role 'at a volatile, polarized time in Finnish politics', in which Marin's party narrowly won a victory over the right-wing populist Finns Party.¹⁹ Like the woman-dominated endgame of *Game of Thrones*, Marin ascended into a coalition government with five women in top spots, while earlier in the year, Finnish women won a record 93 seats in Finnish parliament (47%).²⁰ This stands in sharp contrast to the United States of America (US): while women also won a record number of Congressional seats in 2018, women still make up only 23.6% of Congress, and female presidential candidates are still required to be 'likeable' to the electorate.²¹

Even in 'progressive' countries like Finland, women still suffer under patriarchy. Immigrant women and Sami women in Finland both face discrimination, and immigrant women are less likely to be employed than women born in Finland.²² There is also a lack of rights for transgender women (e.g., forcing those seeking to change their legal gender to undergo enforced sterilisation).²³ However, Marin's more progressive and collaborative leadership style correlates with early studies showing that female leaders are more likely to govern in this way.²⁴ Journalists have noted that 'at a time when the political life of so many nations (e.g., Brazil, India, Hungary) is being reshaped by leaders in a strongman mould', Finland shows that there are alternative styles of leadership.²⁵ The same can be said of Sansa Stark's ascendancy in the North.

Columnists also note that although Finland is a small country of five and a half million people, 'it punches above its weight in terms of soft power—the egalitarianism, family benefits, and forward-thinking environmentalism that Marin embodies'.²⁶ Marin is a part of a growing global cohort of women leaders focused on the collective rather than

the individual. For example, Belinda Luscombe summarises Jacinda Ardern's leadership of New Zealand during and after the terrorist attack in Christchurch:

during a crisis it is possible to lead without telegraphing aggression or playing on anxieties [...]. She made a plausible case that kindness was a strength, compassion was actionable, and inclusion was possible.²⁷

Luscombe noted Ardern's 'ability to articulate a form of leadership that embodies strength and sanity, while also pushing an agenda of compassion and community' and suggests that she has filled New Zealand with 'a new kind of soft power,' quoting political science and IR scholar Professor Bronwyn Hayward:

When you have particular individuals who can harness the moral voice with authenticity and sincerity, that becomes a very powerful moment. Other countries want to be associated with what she represents. [...] it's helpful for other leaders to be associated with her.²⁸

Like Sansa, Ardern and Marin emphasise compassion and collaboration, which makes it appealing for other leaders to support her. This stands in opposition to Daenerys and other leaders who opt to burn the doors down before claiming the contents of the room as their own. Perhaps other nations should turn to leaders who lead collaboratively and administer their territories based on feminine-coded policy and power. If, then, 'propagating constructivist accounts to our understanding of world politics is important', the victory of Sansa Stark could also encourage viewers to recognise and accept alternatives to masculine power.²⁹

Just as the election of Barack Obama as President did not negate centuries of racism in the US, the coronation of fictional female leaders, or the election of non-fictional female leaders does not mean that patriarchy is defeated.³⁰ The recent failed presidential bids of Hillary Clinton, Kamala Harris, and Elizabeth Warren, and the gender politics surrounding them show that misogyny is far from vanquished in either the West or Westeros (as Clapton and Shepherd concede).³¹ Additionally, being a 'feminine' leader is not limited to being a woman: Obama was called 'the first female president' by Dana Milbank in 2012.³² He combined both masculine and feminine leadership to create a unique leadership style.³³ Whereas his main opponent during the 2008 primary season, Hillary Clinton, was deemed 'intimidating', and to some scholars, adapted a 'masculine' leadership style to prove she could be President, which, as this article will show, is similar to Daenerys Targaryen (and, like Daenerys, was Clinton's undoing).³⁴

'I Will Take What Is Mine, With Fire and Blood': A Primer on Power in Westeros

Westeros is a continent divided between seven different administrative regions, each ruled by a different noble house.³⁵ Prior to the conquest and unification of Westeros by the Targaryen dynasty, these regions were independent states. After unification, noble houses retained a significant amount of political influence. The ultimate ruler at the beginning of *Game of Thrones*, who upholds and reinforces the regional power of the noble houses, is the monarch on the Iron Throne in the capital, King's Landing. At the beginning of *Game of Thrones*, no woman had ever ruled uncontested, something that has clear implications for notions of gender and power in the world-building.³⁶

Much academic work has been done on heads of state, and their use of masculinity to perpetuate and maintain power. Supporting Shepherd's assertion,³⁷ J. Ann Tickner, in an analysis of Hans Morgenthau's work, suggests a long association between masculinity and politics, noting that characteristics associated with 'manliness' (such as toughness, courage, power, independence, physical strength, violence, and use of force), have consistently been among the most valued and valorised traits in international politics.³⁸ Tickner goes on to argue that this type of masculinity excludes feminine attributes associated with relationality, contextualism and emotion.³⁹ In a pioneering work on masculine power in IR, Carol Cohn also notes how the state itself can be coded as male in international politics: '[t]he United States frequently appeared in discussions about international politics as [a] "father," sometimes coercive, sometimes benevolent, but always knowing best'.⁴⁰ Like Tickner, Cohn identifies masculinity as a set of attributes (e.g., aggression, risk-taking, action, etc.) that are societally coded as being 'masculine' and therefore preferable.⁴¹ Traits that are not deemed 'masculine' are then coded as 'feminine' by default and discarded as ineffectual.⁴² For instance, Cohn posed questions without technical jargon (correlated with aggression), such as 'escalation dominance', 'pre-emptive strikes', and 'sub-holocaust engagements'.⁴³ This was seen as 'feminine' and Cohn as 'ignorant, simpleminded, or both'.⁴⁴ Jean Bethke Elshtain has similar findings, and notes how merits that are coded as masculine sustain war and power structures in which masculinity trumps femininity.⁴⁵

Feminine power in international relations is often tied to qualities coded as 'feminine' in Western society, such as intuition, empathy, vulnerability, passivity and cooperation.⁴⁶ Tickner states:

The most dangerous threat to both a man and a state is to be like a woman because women are weak, fearful, indecisive, and dependent... Characteristics associated

V. Spike Peterson and Anne Sisson Runyan say that even when a woman wins political office, or has political success, she loses.⁴⁸ Women in political office are often accused of supporting the status quo if they align themselves with masculine agendas, or else of reinforcing 'traditional woman' stereotypes if they focus on soft issues.⁴⁹ As Charlotte Hooper states, such theories essentialise both masculinity and femininity.⁵⁰

Olesker discusses Daenerys in the context of how identity and norms are utilised in alliance formation and power transition.⁵¹ I focus on this article for the sake of Olesker's views on gender, power, and the 'Other' in *Game of Thrones*. A discussion of gender and how it relates to these fields is conspicuously absent in Olesker's article, which argues that gender 'is not a feature of alliance formation and thus does not inform the discussion here on transitions of power.'⁵² I disagree: in Series Seven, which Olesker analyses, gender is referenced many times. For instance, Cersei's alliance with Euron Greyjoy hinges on agreeing to marry him once the war is won.⁵³ Olesker claims that Daenerys rules by utilising consent (as opposed to Cersei, who rules by command), tying both leaders to John Ikenberry's work on the differences between a liberal hegemony (Daenerys) and a dictatorship (Cersei), as well as Lake's work on the importance of legitimacy in sustaining hegemonic order.⁵⁴ Olesker writes that while Daenerys is able to force individuals to yield to her power with her dragons, the majority of her allies 'choose her by explicit consent to rule'.⁵⁵ Olesker admits that Targaryen rule by explicit consent is short lived, as 'Daenerys ultimately abandons the legitimacy of ruling by consent, betraying the norms she previously champions',⁵⁶ a decision which leads to her untimely death by the hands of her allies.⁵⁷

Whereas it is clear that Olesker knows International Relations, it is also evident that Olesker does not understand *Game of Thrones*. It is a tenuous argument to claim that Daenerys Targaryen had, at any point, ruled by explicit consent. The majority of the Dothraki submit only after Daenerys burns the main temple in their capital city to the ground, killing the majority of the Dothraki leadership and making it clear that she controls dragons that can easily kill them all.⁵⁸ As other scholars and I have already suggested, dragons are analogous to weapons of mass destruction in Westeros and the Targaryens both identify as and rely upon dragons.⁵⁹ This also ties to how masculine identities in IR have concrete effects, such as the perpetuation of nuclear deterrence and war.⁶⁰

Similarly, arguing that the Unsullied 'consent' to Daenerys' rule is comparable to arguing that sharecropping was a resounding success for emancipated slaves in the American South during Reconstruction, when in fact the white planters often attempted to simulate slave conditions

with their workers whenever they could (such as putting labourers in old slave quarters, and prohibiting conversation or leaving the plantation without permission).⁶¹ There is little evidence that Daenerys pays the Unsullied, something that would differentiate their labour from enslavement. *Game of Thrones* often shows a Small Council of advisors to the monarch discussing the minutiae of governance, including the pay of soldiers and similar forces: one of Lord Eddard Stark's first policy moves is to ask for funding to strengthen the Gold Cloaks (the City Watch of King's Landing, a pseudo-police force sworn to the Iron Throne) and the books note that there are sometimes difficulties in ensuring that those employed by the City Watch receive their wages.⁶² In comparison, wages for the Unsullied are hardly mentioned in either medium.

In Series Eight, Daenerys moves her armies to a new continent without adequate supplies and it is established early on that she expects to take what she wishes because of her 'nuclear deterrent' dragons.⁶³ In one notable scene, Sansa expresses frustration at the thousands of additional human mouths she must feed, as well as two dragons, at a public council meeting. Exasperated, Sansa asks, 'what do dragons eat, anyway?' Daenerys retorts, 'whatever they like'.⁶⁴ This exchange shows Daenerys, dragon-like, feeling both entitled and able to take whatever she wants, while the pack-leader Sansa frets over the masses for which she is responsible. Notably, Daenerys also identifies as a mother (the 'Mother of Dragons'), but attempts to combine feminine motherhood with masculine power. The people of Winterfell cower at the sight of Daenerys's dragons at the beginning of Series Eight, something Daenerys enjoys, but fails to see as a potentially dangerous reaction.⁶⁵ A similar incident occurred during the 2008 US Presidential Campaign: an attack ad on Obama's lack of experience by the Clinton campaign intended to combine the 'mother' image with the 'the more masculine commander-in-chief'. The ad showed children sleeping, followed by a mother checking in on her child. The voiceover then asked who viewers wanted answering the phone in the White House at 3AM and cut to a professionally dressed Clinton in reading glasses (intended to 'emphasise Clinton's understanding of mothers and their concern for their children's well-being').⁶⁶ The ad was lambasted in the media, with commentators claiming that the ad scared them and that the last thing the US needed was 'that woman anywhere near the phone'.⁶⁷ Like Clinton, Daenerys Targaryen also struggled to connect with the people of Westeros, noting that 'I don't have love here [in Westeros]. I only have fear'.⁶⁸ Many contemporary leaders do not hesitate to terrify the masses with sabre-rattling. For example, speaking from his golf course in New Jersey, President Trump responded to Kim Jong-un's threats by saying:

North Korea best not make any more threats to the United States. They will be met with fire and fury like

It is not a stretch to imagine Trump uttering lines originally spoken by Daenerys (such as, 'I will take what is mine. With fire and blood, I will take it').⁷⁰ As Nick Hilton has stated in a review of 'Eastwatch' (Series Seven), Daenerys Targaryen is the Trump doppelgänger of *Game of Thrones*, noting that both Trump and Targaryen have the same reliance on 'fire and fury',⁷¹ and that 'Dracarys' (a command for her dragon to breathe fire) has become the Westeros equivalent of 'You're fired'.⁷² After watching Daenerys execute unarmed Westerosi prisoners of War, Hilton writes: '[Eastwatch] shows how an unfancied outsider can become a confident, charismatic and controversial leader once they have their finger on the nuclear, or more draconic, option'.⁷³ Hilton neglects to mention the bodies of people of colour that Daenerys left in her wake in order to get to Westeros. The mass slaughter of the various people of Essos on dragonfire relates to issues regarding whiteness and privilege surrounding Daenerys.

Another example of Daenerys's separateness from her people is shown in the use of 'of' in her formal title: 'Daenerys Stormborn of House Targaryen, the First of Her Name, Queen of the Andals and the First Men, Protector of the Seven Kingdoms, the Mother of Dragons, the Khaleesi of the Great Grass Sea, the Unburnt, the Breaker of Chains'.⁷⁴ Note that Sansa is called the 'Queen *in* the North', showing that, at least symbolically, Sansa stands with, not above, her people. This prioritisation of the masses and lack of bellicose statements again aligns Sansa with Sanna Marin, who is focused on governing the collective, saying, 'I want to build a society where every child can become anything and every person can live and grow in dignity'.⁷⁵ Marin focuses on tackling climate change, equality, and social welfare. Ferocity, aggression, and a willingness to use force are not the cornerstones of leadership style or policy for Marin or Ardern. In a press conference after the Christchurch terrorist attack, Ardern did not respond with violent rhetoric, instead saying:

We were chosen for the very fact that we... represent diversity, kindness, compassion, a home for those that share our values, a refuge for those who need it. And those values, I can assure you, will not and cannot be shaken by this attack.⁷⁶

Compassion is the centre of Ardern's narrative, and there is a notable lack of reference to feats of arms.

Sansa possesses the life skills necessary for running a complex logistical operation due to her privileged position in society. In contrast, the Unsullied have no family connections or life skills with which to leave mercenary work and so may well stay 'loyal' to Daenerys out of necessity.

This is evident when Daenerys ‘frees’ the Unsullied: shortly after her dragon burns a slaveowner alive, she holds onto the whip that forces the Unsullied to do her bidding and commands the slaves to kill their masters, only promising the Unsullied their freedom after her enemies are dead.⁷⁷ As Nyah Burton states:

Her actions encapsulate the essence of white saviourism, and she continues this pattern as she travels through Valyria, “freeing” slaves, and even though she is portrayed by the writers as a liberatory figure, she is nothing more than a colonial power. [...] Her ‘kind heart,’ as Jorah refers to it, is ultimately self-serving.⁷⁸

Olesker notes that Cersei falsely paints Daenerys as an ‘other’, stating ‘Daenerys’ enemies consider her a foreigner even though she was born in Westeros and is the daughter of the former king’.⁷⁹ Here, Olesker conveniently forgets that the Targaryens are originally from Essos. Being a conqueror is different from being an immigrant; the implications are broader and more dire. The Targaryen Conquest brought fire and blood to Westeros (a prominent battle is called ‘The Field of Fire’), before plunging the realm into chaos for hundreds of years.⁸⁰ Thus, we can see that the Targaryens, their dragons, and the masculine power they represent can *conquer*, but cannot *rule*.

Daenerys proudly declares that she is from Essos when it suits her; for example, when she goes to purchase the Unsullied. The majority of the transaction occurs in Valyrian, a language established as foreign and unintelligible to many people in Westeros.⁸¹ The slave trader complains in Valyrian that Drogon, the dragon given as payment, will not come to him. Before the complaint can be translated, Daenerys responds, in perfect Valyrian, that ‘a dragon is not a slave’. She goes on, ‘I am Daenerys Stormborn of the House Targaryen, of the blood of Old Valyria [a ruined city in Essos]. Valyrian is my mother tongue’, and then commands the dragon in Valyrian with the word *dracarys* (translated as dragonfire).⁸² There is no doubt that in some sense Daenerys’s power is derived from her ancestral homeland. As Burton notes, Daenerys is also a white woman whose homeland is populated by people of colour.⁸³ I will return to issues of race, privilege, and power in Westeros in relation to Sansa below.

In the early series of *Game of Thrones*, Daenerys lies between masculine and feminine power; by the end of the final season, Daenerys has perpetuated and personified masculine power. She loses her timidity as she emerges from her first husband’s funeral pyre with three newly-hatched dragons gripping her body.⁸⁴ Daenerys notes that after the apparent extinction of the last living dragon in the reign of King Aegon ‘Dragonbane’ Targaryen III, the Targaryens suffered.⁸⁵ She states:

[Dragons] were terrifying. Extraordinary. They filled people with wonder and awe, and we locked them in here. They wasted away. Grew very small. And we grew small as well. [...] We were just like everyone else.⁸⁶

Soaring into this scene on a dragon, Daenerys identifies herself as extraordinary and worthy of rule. However, her rise to power is not extraordinary: her reliance on dragons and prowess in war reinforces and upholds the gendered foundations of political authority in Westeros. Her willingness to use tremendous force simply cannot be matched by any of her competitors.⁸⁷ Clapton and Shepherd suggest that '[...] The development of Daenerys' authority and her growth as a ruler and leader both depend on her internalisation and exhibition of masculinised traits'.⁸⁸ Daenerys claimed that she wanted to 'break the wheel' of structural power in Westeros, but as Clapton and Shepherd note, Daenerys does not accomplish much.⁸⁹ By the end of *Game of Thrones*, Daenerys has become 'a part of the system of patriarchy and gendered authority that exists in *Game of Thrones*'.⁹⁰ Some feminist scholars may claim that an individual can be subversive and still use the language and tools of empire, privilege, and power. For example, feminists may use masculine, warlike, or military language to critique patriarchy.⁹¹ For example, Charli Carpenter argues that Daenerys was strategically limited by patriarchal culture to adopt masculine archetypes in order to gain legitimacy and authority, before she could use these exact archetypes as a means to subvert them, fighting 'fire with fire'.⁹² However, I am more inclined to agree with Audre Lorde:

The master's tools will never dismantle the master's house. They may allow us temporarily to beat him at his own game, but they will never enable us to bring about genuine change. And this fact is only threatening to those women who still define the master's house as their only source of support.⁹³

Daenerys uses the sun to 'hide' her dragon from sight, subsequently swooping down to torch the Greyjoy fleet, a tactic utilised by her ancestor Aegon the Conqueror when he burned the castle and people of Harrenhal as part of the conquest of Westeros.⁹⁴ By using the master's tools, Daenerys is dooming her reign to be short – and it is. In the thousands of years that encompasses the history of Westeros, the Targaryen dynasty lasted only three centuries, compared to the Starks, who, pre-conquest, ruled the North for eight thousand years.⁹⁵ Although Daenerys attempts to be a 'different' leader, she is like the Targaryen Westerosi rulers before her, using the same masculine tactics and tools to

cultivate and preserve her authority and thus present herself as a warrior and conqueror.⁹⁶

Both Carpenter's and Clapton and Shepherd's articles were published before the final series aired, but in Series Eight, Daenerys speaks several times of her preference for ruling with masculine power, speaking of how she thrives on the Westerosi people's fear.⁹⁷ Daenerys is confronted by Jon Snow after burning down King's Landing – a decision that resulted in the deaths of hundreds of thousands of civilians – and orders the Unsullied soldiers to execute unarmed Lannister prisoners of war in the street. Daenerys retorts that these deaths are 'necessary', and that it is impossible to 'hide behind small mercies'.⁹⁸ This brings to mind sentiments attributed to both US military policy in the Vietnam War – 'it became necessary to destroy the town to save it' – and Joseph Stalin: 'one death is a tragedy; a million deaths, a statistic', placing Daenerys's use of fictional masculine power alongside real examples.⁹⁹

Daenerys's attempt to rule through accepted structural distributions of mass power – the aforementioned traits of confidence, ferocity, aggression and a willingness to use force – ultimately backfire on both her and the audience: the fans who cheered Daenerys as she unleashed her dragons upon Meereen (a city in Essos) were horrified when she did the same at King's Landing.¹⁰⁰ This could be partly because of the way Meereen is consistently 'othered' in *Game of Thrones*. Meereen is mostly populated by people of colour, with an official language that is a dialect of Valyrian (a language that, as mentioned, many people in Westeros do not speak). Much like Debra Ferreday's argument about rape scenes only impacting the audience if the victim is white, and if the scene 'disrupts the pleasurable narrative of a white character's redemption', fan backlash against Daenerys burning King's Landing to the ground is in very much the same vein.¹⁰¹

Many women mentioned by name in this article, whether fictional or non-fictional, are white. As in the real world, in Westeros whiteness operates as a default. Helen Young has discussed whiteness in both the fandom of *Game of Thrones* and in fantasy literature.¹⁰² She notes that the roots of the lack of racial diversity in fantasy are deep and widespread, and that lack of diversity is perpetuated by Martin.¹⁰³ Many of the common responses to criticisms of racial representations in the world of *Game of Thrones* on the online forum *Westeros.org* are based on the assumption that medieval Europe was white, so therefore the fictionalised world of Westeros should be white. As Young notes, this is far from the case. Europe in the Middle Ages was not populated exclusively with varieties of white people.¹⁰⁴ Young's study on fans who criticised the racial composition of Westeros notes that they were seen as 'troublesome for its eponymous online fan community [Westeros.org]'.¹⁰⁵ Fan voices critiquing whiteness in Westeros 'are suppressed using tactics which strongly reflect discourses which support white privilege

in modern western society by normalizing it'.¹⁰⁶ Sansa could be seen as a vessel for whiteness and privilege, particularly in the context of her conversations with Daenerys in Series Eight. Burton states:

When Sansa remains dedicated to the North [...] the show allows us to see her as a hero standing up to a bully, but every non-white society Dany conquered was forced to give up their sovereignty in service of her moral superiority. The implicit message here is that brown indigeneity is purpose-less and morally depraved, but white representations of indigeneity are bold, honourable, ungovernable, and possessing the right of self-determination.¹⁰⁷

Many of the people of colour fighting against Daenerys' colonising rule, such as Mirri Maz Duur of the Lhazareen, are depicted with far less sympathy than Sansa. Sansa has also been criticised by some scholars as an example of 'fetishized whiteness', whose attempted rape during a riot against the royal family in Series Two is 'depicted both as the natural result of her beauty and as the action of literal peasants in the palace, outsiders waging war on privileged, vulnerable white femininity'.¹⁰⁸ This stands in opposition to, for example, how sexual violence against people of colour is depicted in the series, and whether the perpetrator is a white, titled nobleman that the audience is supposed to root for, such as Jamie Lannister. There is voluminous scholarship on sexual violence in *Game of Thrones*, and while that subject is not the focus of this article, it is relevant here as both Sansa and the women of colour who are survivors of sexual assault are used as symbols.¹⁰⁹ Even when white women are victims in *Game of Thrones*, they are still, in some senses, experiencing a form of privilege in being named and seen as sympathetic, as opposed to the numerous un-named and un-mourned women of colour raped by Drogo's khalasar, for example. Ferreday finds that:

In fantasy as in life, the rape is intelligible when it happens to 'Others'; further, it is presented as cathartic, even pleasurable, when we get to see the rapist punished or the heroine rescued. What is more problematic is when it happens to a privileged white woman and—crucially—when it disrupts the pleasurable narrative of a white man's redemption, spoiling his transition to a better future.¹¹⁰

Women who rule Westeros using masculine power were viewed as authoritarian rather than legitimate.¹¹¹ There are two examples of this:

Cersei Lannister, who is killed in the conquest of the Westeros capital, and Daenerys Targaryen, who is assassinated as a result of that conquest, which killed hundreds of thousands of civilians. As Cersei says in Series One, 'when you play the game of thrones, you win or you die. There is no middle ground'.¹¹² By Cersei's own standards, therefore, both she and Daenerys lose the game, while Sansa wins, having rejected 'hard' or masculine power.

The Queen in the North: How Feminine Power Won The Game of Thrones

Like Daenerys, who defers to her brother for the first few episodes, Sansa is compliant with the men around her for the majority of the first series. She is betrothed to the heir of the Iron Throne, Joffrey Baratheon. Sansa wants nothing more than to be a mother to Joffrey's sons. Recalling this paper's earlier mention of white privilege, she expresses this as, 'he'll be the greatest king there ever was, a golden lion, and I'll give him sons with beautiful blond hair'.¹¹³ Trouble begins for Sansa after Joffrey's false testimony causes King Robert to demand the execution of Sansa's pet direwolf, Lady. After the death of King Robert, Joffrey is further revealed as a monster who abuses Sansa and executes her father.¹¹⁴ While Sansa's sister Arya successfully escapes, Sansa remains, a political prisoner.¹¹⁵

Sansa still, in some ways, offers a masculinised version of power over her subjects as regent. Can anyone be truly free when non-dominant genders are under silent subjugation? As Hooper states, 'swapping female for male bodies in traditionally masculine arenas does little to disrupt either the symbolism or practices of the gender order'.¹¹⁶ Hooper also argues that 'the importation of feminine characteristics' does not 'automatically redress the gender imbalance, especially if women themselves are still underrepresented in positions of power'.¹¹⁷ While this is true, I suggest that having a woman in a position of power is still a victory on a show whose fan-favourites include rapists and murderers.

Sansa comes to power without being a warrior in the traditional sense, and every intervention she makes aims to preserve and improve her people's lives. At a meeting with Bolton leaders and bannermen, Sansa does not join the sabre-rattling, like her rapist Ramsay Bolton (who gloats that he is starving his hounds in anticipation of feeding them Starks), nor does she ask that Bolton face her in 'mano-a-mano' combat, like her brother, King in the North Jon Snow – note how Bolton and Snow's escalation here, in some regards, mirrors the antagonistic statements made by Kim Jong-un and Donald Trump mentioned earlier. Instead, Sansa remains calm and icy, commenting only that, 'you're going to die tomorrow, Lord Bolton. Sleep well'.¹¹⁸ Sansa's self-control stuns the showboating Bolton into silence, something Snow fails to do. Notably, in

the reclamation of the North from the Boltons, it is Sansa who writes to rally the Knights of the Vale to her cause, who arrive at a pivotal moment in the battle.¹¹⁹ Another example (discussed later) is Sansa obtaining independence for the North post-Targaryen conquest, via diplomacy.

In contrast, there is no doubt that Snow is a man of action, a quality often praised in male actors in IR. Snow is a reluctant leader who maintains his authority in masculine ways: the fact that his men follow him into battle willingly, regardless of the odds, is a strength mentioned by both Snow's allies and opponents. After Snow sees his unarmed prisoner of war brother Rickon killed, he abandons the pre-planned battle strategy and charges across the field. Prior to this strategic error, Snow dismissed Sansa's advice. In this conversation, which takes place in a tent by the battleground, Sansa remarks that Snow and his advisors are planning to defeat a man that they do not know. Sansa has a deep understanding of how his mind works, and comments that, 'I know how he likes to hurt people. Did it ever once occur to you that I might have some insight?'¹²⁰ Later on in the conversation, Sansa once again reminds Snow that he has never asked for her advice regarding military strategy; if he had, she would have told him to wait until Stark forces had grown in size before attacking. Snow does not listen to Sansa because he believes his military experience both supersedes and negates Sansa's personal experiences of their mutual enemy. In doing so, Snow also dismisses rape as a weapon of war: in some senses, Sansa has fought as many harrowing battles as Snow. While, on the surface, the show shows a preference for masculine power, which is associated with aggression and impulsive action, a deeper reading shows this strategy ultimately leads to disaster. After Snow's charge forces Stark soldiers out of position, thousands of Northmen die in the ensuing battle. Indeed, prior to the arrival of the Knights of the Vale, Stark forces were surrounded, crushed between walls of corpses. It is the 'feminine' power of Sansa (e.g., letter-writing, collaboration, patience and strategy) that wins the day, much as Sansa's 'feminine power' ultimately wins the North's independence. Sansa's multiple triumphs illustrate that there is merit to her approach.

However, in line with Peterson and Runyan, even after one of Sansa's greatest political successes, she loses in many ways. Shortly after Sansa's victory in reclaiming Winterfell, she faces both suspicion and homicidal ideation originating from her sister, Arya.¹²¹ This is because a letter written by Sansa, begging the previous King in the North, Robb Stark, to bend the knee to Joffrey Lannister, was unearthed by Arya shortly after her return to Winterfell. Sansa explains to Arya that it was written in an attempt to save their father, when she (Sansa) was a hostage in King's Landing. Arya disregards this, saying that she (Arya) would have rather died than betray her family. Arya notes that Sansa never participated in feats of arms such as archery because she was 'inside knitting', deliberately contrasting male and female pursuits.¹²²

Finally, Arya comments on Sansa's sartorial choices on the day that their father was supposed to be pardoned, mentioning the beauty of her dress and hair (we return to Sansa's clothing below).¹²³ However, Sansa is not the reason that Eddard Stark is dead: her pleas for mercy were dismissed as 'soft'. This relates to Tickner's notion that 'the most dangerous threat to both a man and a state is to be like a woman because women are weak, fearful, indecisive, and dependent'.¹²⁴ The public, violent execution of Eddard plunged the realm into disarray, under a ruler that believed legitimacy lies in 'masculine' power.

Although Arya insults Sansa on multiple grounds, Sansa focuses on reconciliation. Throughout their conversation, Sansa keeps her temper. Sansa focuses on collaborating and strengthening bonds, noting that internal conflict is exactly what Cersei (their shared enemy) wants and highlighting the merit of remaining calm – 'sometimes anger makes people do unfortunate things' – a distinctive trait of feminine power that once again distinguishes her from other powerful women in the series.¹²⁵

As mentioned, after escaping King's Landing, Sansa suffers compounding traumas, including her attempted murder, rape, the deaths of various family members, and the dead attacking Winterfell. Trauma is often used to give female characters a 'reason' to be tough and resourceful.¹²⁶ Here, Sansa is tested, 'earning' the throne in a way that perhaps a man would not need to. This includes her marriage to Bolton, as a means for the Bolton family (the new Wardens of the North under Baratheon/Lannister rule) to gain political legitimacy.¹²⁷ Marriage as a means to gain political legitimacy has been studied extensively, and Duran Bell has indicated that, in cases like that of Sansa and Ramsay, the men in the relationship take a dominant position and legitimacy is revealed as a 'political strategy of dominant groups'.¹²⁸ In this marriage, Sansa appears to hold the power when in fact she has none. She is raped violently on her wedding night by Bolton.¹²⁹ In fact, it is notable that all the queen regents in *Game of Thrones* are survivors of rapes at the hands of intimate partners: Cersei Lannister, for example, was raped by both her husband and her brother/lover.¹³⁰ Daenerys Targaryen suggests that her own traumas (which also includes a rape and a political marriage) add to her power. She says:

I have been sold like a broodmare. I've been chained and betrayed, raped and defiled. Do you know what kept me standing, through all those years in exile? Faith. Not in any god, not in myths and legends. In myself... I was born to rule the Seven Kingdoms, and I will.¹³¹

Rape is about power.¹³² IR scholars note that rape is routinely used as a weapon of war and conquest.¹³³ Are the powerful queens and would-be queens of Westeros being undermined with rape, then, or is

something more subtle and political being suggested? While Daenerys believes she has transformed her victimisation into victory, Cersei has a very different attitude. After being told that little girls are not hurt in Dorne (one of the Seven Kingdoms), Cersei bitterly replies, 'everywhere in the world, they hurt little girls'.¹³⁴ Sansa echoes this in her conversation with Snow just prior to the battle to reclaim Winterfell: each queen provides a fatalistic but truthful depiction of the dangers faced by women under patriarchy. In Series Eight, after Sandor Clegane (the Hound) tells Sansa that he 'heard [she was] broken in rough', Sansa simply comments that her rapist (Ramsay) 'got what he deserved'. However, she goes on to say something more problematic: 'without Littlefinger and Ramsay and the rest, I would have stayed a little bird all my life'.¹³⁵ Sonia Saraiya, in a piece written for *Vanity Fair*, rightly pointed out that this quote inaccurately represents sexual trauma (forgiving abusers is different than declaring being raped made you stronger), before saying:

But what really makes no sense is that while Sansa apparently agrees that she was 'broken in', transformed from a little bird into a queen through the brutalization of men, in this conversation, she exerts no power of her own. She doesn't tell the Hound [Sandor Clegane] to fuck off with his metaphor... She just sits there and takes it.¹³⁶

By having all three female rulers as survivors of sexual assault, the writers may also be suggesting that this is the only way in which a woman can acquire strength. Notably, the ways that Saraiya expects Sansa to show her power and rage (shouting and swearing) are inherently masculine and disregard the fact that Sansa had killed two of her many abusers (again, in cold blood, with calmness and thought).

When Sansa expresses a capacity to use force, she tends to do so in private, subtle ways, avoiding the stirring eve-of-battle speeches of Daenerys or feats of arms like Arya or Brienne, though she does depute both of these women to bear arms on her behalf. At the end of Series Seven, Arya Stark publicly executes Lord Protector of the Vale Petyr Baelish [Littlefinger], the man who orchestrated Sansa's marriage to Bolton, on Sansa's icy command (Sansa did not express satisfaction before or after sentencing Littlefinger to death). Notably, when Arya asks Sansa before the execution of Petyr Baelish if she truly wants him to die, Sansa says, 'it's not what I want, it's what honour demands... That I defend my family from those who would harm us. That I defend the North from those who would betray us'.¹³⁷ Instinctively, Sansa recoils from executing Baelish in front of the whole court but does so because he represents a danger to the North as a whole. Here, Sansa asserts herself publicly to protect the sovereignty and safety of her territory.¹³⁸ If we

compare this to other moments in which such executions are carried out behind closed doors, Sansa's sound political instincts and ability to adapt are clear: she is able to do something that repulses her because she realises it is strategically necessary. In other words, Sansa sees that this is an instance in which 'the master's tools' are the right ones for the task at hand, per Lorde's analogy; moreover, she is able to reach for this option without becoming habituated or limited in her ability to 'dismantle the house'. When Sansa feeds Ramsay to his own hounds, she again remains calm and controlled.¹³⁹ As Ramsay is devoured, she turns away and allows herself a smile. This smile, and Sansa chuckling with Sandor Clegane after informing him that she had done so in Series Eight, lead Saraiya to say, 'it's very *Game of Thrones* to see characters only express satisfaction when their power has been achieved through brutal, irrevocable violence', but I argue that Sansa's power is better understood in terms of *how* she behaves as well as what she does.¹⁴⁰ Acts such as securing the support of the Knights of the Vale and silencing Bolton during the meeting prior to the Battle of the Bastards are public events that cement her loyalty to the North and her people, whereas Bolton's death and how she brings it about is something known to only a few people. While rapists and murders remain fan favourites, it is cool-headed Sansa that is disliked by fans, perhaps because the ways Sansa expresses her power are not relatable to the male-majority fan-base.¹⁴¹

This sense of privacy and self-containment is important: Sansa differentiates herself from both Daenerys and Cersei, whose vengeance is both public and masculinised. In the final season of *Game of Thrones*, the world knows that Daenerys has executed unarmed prisoners of war who would not recognise her sovereignty (the Tarlys), and that Cersei had no qualms about executing her political opponents (such as the detonation of the Great Sept of Baelor, which not only killed her rivals but a good portion of the population of King's Landing). Sansa is no less ruthless, but her acts of aggression are quiet and concealed: more public demonstrations of strength and cruelty would likely provoke a violent response from her rivals and perhaps an 'arms race' of aggression and brinkmanship. Sansa's calm demeanour and caution sets her apart from these other female rulers.

Unlike Daenerys, in Series Eight, Sansa does not breathe verbal or dragon fire. Instead, she is calm, even icy (individuals from other regions of Westeros joke that Starks melt if they travel too far south).¹⁴² Sansa has clearly embraced and embodied this family trait. A more typical display of Sansa's disgruntlement can be seen in her greeting to Daenerys and Snow when they arrive at Winterfell. While it is clear from her tone that she is unhappy at the arrival of Targaryen forces at Winterfell, she speaks the same line with which her father greeted King Robert in the very first episode of *Game of Thrones* – 'Winterfell is yours, Your Grace'.¹⁴³ Again, Sansa chose to wait and see, acknowledging the security of her

territories and people as her first priority.

Nevertheless, the notion that 'without Littlefinger and Ramsay and the rest, I would have stayed a little bird all my life' remains problematic in many ways, and is perhaps tied to the lack of female writers and directors in the final season of *Game of Thrones*.¹⁴⁴ Across all eight series, only one female director (eighteen male) and two female writers (seven male) were employed.¹⁴⁵ While several of the main female characters were written as 'women defying prescribed gender roles by operating in primarily male arenas', this does not negate the male gaze of the show, presenting women as sexual objects for the male viewer, whether that viewer is a character, behind the camera, or watching at home.¹⁴⁶ Anything Sansa does, from a feminist perspective, is necessarily marred by the dominance and ubiquity of the male gaze in popular entertainment.

Sansa's corporeal styling in the final series suggests a rejection of femininity, rather than a victory of female power. Certainly, Sansa sets aside soft pastel-coloured clothing as the series progresses, and the series ends with her clad in black and leather, reflecting her internal transformation.¹⁴⁷ Sansa is a skilled seamstress, making her own clothing, and therefore in total control of how she presents herself.¹⁴⁸ Her clothes are a way for her to 'give voice to her feelings ... she knows she can't confide in anyone'.¹⁴⁹ Her costuming in earlier seasons, laden with pastels and embroidered dragonflies trapped in elaborate circles, shows the influence of the colour palette of Cersei and her courtiers and illustrates how stifled Sansa is feeling.¹⁵⁰ When Sansa escapes the Lannisters, she reinvents herself and is seen for the first time in the dark colours that dominate her clothing for the remainder of the series. *Game of Thrones* costume designer Michelle Clapton notes:

...To communicate this profound change in her nature, I designed a look that symbolised the death of 'victim Sansa'...I paired the costume with a powerful necklace, a circle through which Sansa threads her sewing needle. An unbroken circle symbolises strength. This is a symbolic statement that Sansa is ready to fight. It is also a reference to her sister, Arya, who carries a sword named Needle.¹⁵¹

The shift in Sansa's clothing, which some viewers might view as an attempt at masculinisation, is in fact laden with subtle messages of feminine fortitude. A sewing or knitting needle is considered less threatening than a sword, but it is no less powerful: knowing how to construct and make warm, robust garments in the North is just as vital a skill for survival in harsh winters as military prowess. The padded fabric and leather strapping of Sansa's gowns in later seasons refer to traditional

Stark styling.¹⁵² Like her other costumes, Sansa's coronation gown at the end of the series refers to both her family (with elements representing her parents, siblings, and Winterfell) and her friends (the murdered Margaery Tyrell, and her dead direwolf Lady), which Clapton notes is true to the woman Sansa has become. Even Sansa's crown features 'two direwolf heads supporting each other', very similar to a clasp worn by Robb when he died at the Red Wedding.¹⁵³ The crown also expresses the queen Sansa has become: one with a focus on collaboration and feminine power.

Series Eight shows Sansa has grown into a woman who has no qualms about questioning male authority. This is shown when Sansa asks Snow (who had bent the knee to Daenerys, giving away the North's independence and sovereignty), 'did you bend the knee to save the North, or because you love her?'¹⁵⁴ This moment coincides with Sansa's growth as a character: since her mid-teens, Sansa has consistently placed the interests of Winterfell and the North above all others. This also shows that Sansa has transformed from a girl who yielded to masculine authority and her own interests, to a woman who openly challenges the decisions of male leadership at the behest of her people's interests. Sansa effectively governs the North as the Lady of Winterfell; she is the only person concerned with logistics.¹⁵⁵ Sansa also has legitimate reasons for challenging Daenerys's plan to hurry south to face the Lannister forces after the armies of Daenerys and the North emerge victorious from their battle with the dead, suggesting instead that the armies should recover before attacking King's Landing.¹⁵⁶ Although Sansa lacks the ferocity and aggression of masculine-coded power, she has feminine-coded resourcefulness and a focus on collaborative rule instead. Sophie Turner, who plays Sansa Stark, noted the disparity between Sansa's use of power, and that of her sister Arya (played by Maisie Williams):

In the beginning, I was jealous of Maisie, because she got to do all these sword fights and be the badass. I was like, 'I know my character is very powerful.' Sansa adapts better than Arya. If Arya was in Sansa's situation at the beginning, she would have had her head cut off.¹⁵⁷

This also shows Sansa's adaptability, a trait commonly associated with women and leadership. Like several non-fictional female politicians, Sansa reinvents herself several times throughout *Game of Thrones*.¹⁵⁸ Turner also notes Sansa's power and the internalised misogyny that comes with an initial reading of what society deems 'badass' (sword fights). Rather than an elite warrior like Arya who wields steel, Sansa becomes the steel herself.

Turner is correct that her character is powerful. In the final episode of the final series, Sansa finally gains sovereignty for the North

when the nobles of Westeros, as well as Daenerys's proxy Grey Worm, convene to discuss the fates of the two individuals who orchestrated her assassination: Tyrion Lannister and Jon Snow. Lannister suggests that the future monarchs of Westeros be chosen by a council meeting of all the noble houses leading Westeros's seven different administrative regions. The nobles present agree. Lannister then nominates Bran Stark, Sansa's brother, as King of Westeros. Again, all the nobles present agree, except Sansa. She says:

[T]ens of thousands of Northmen fell in the Great War defending all of Westeros. And those who survived have seen too much and fought too hard ever to kneel again. The North will remain an independent kingdom, as it was for thousands of years.¹⁵⁹

Stark accepts both his kingship and the North's independence and thus Sansa achieves through diplomacy what her brother Robb through battle could not: an independent and sovereign North, with a Stark as monarch. The last words of the show are the cries of the people of the North at Sansa's coronation ("The Queen in the North!"), reminding the viewer who the true winner in the game of thrones is.¹⁶⁰

The only other ruler in Westeros established at the end of *Game of Thrones* is Bran Stark. Stark is confined to a wheelchair, and his injuries are assumed to prevent him from reproducing, indicating that he does not adhere to a traditional cisgender, heterosexual trajectory in yet another rejection of hegemonic masculine power.¹⁶¹ Stark does not adhere to other qualities associated with 'masculine' leaders, often sitting quietly in council meetings, only speaking when absolutely necessary, thinking abstractly (as opposed to concretely), and saying things that could easily be perceived as irrational. Most notably, because of his life-altering injuries, Stark is entirely dependent on those around him. Each of these traits has been coded as 'feminine' in the West.¹⁶² Stark, though not the focus of this article, supports its thesis: ultimately, Westeros rewards those who excel at an approach to policy that could be coded as feminine.

Clapton and Shepherd say that gender, as a category of analysis in relation to power, has not been the point of analysis and critique by influential scholars in IR, although they concede that feminist scholarship has often studied the subject.¹⁶³ While it can be said that IR specifically lacks this type of scholarship, feminist scholarly discussions on the gendering of power or policy, as well as rethinking power from a feminist perspective, have been undertaken in great detail.¹⁶⁴ Studies on women in relation to the context in which they lead (or seek to lead) have had relatively consistent findings.¹⁶⁵ Female leaders are task-oriented problem-solvers who hold themselves and others to high standards, and when research turns to images of women as leaders, these women are

often described as 'collaborative, caring, courageous, and reflective'.¹⁶⁶ Sansa exhibits all of these qualities. Sansa does not pursue an aggressive foreign policy unless the North or its leaders are directly threatened. In Series Seven, Sansa underscores this: 'I'm sure cutting off heads is very satisfying, but that's not the way you get people to work together'.¹⁶⁷ While Sansa has, in fact, ordered the execution of two of her abusers, this display of power and violence is not typical of Sansa. This is reinforced later in the episode, when Arya and Sansa are discussing Sansa's status as Lady of Winterfell. Arya has let go of her anger, and remarks, 'I never could have survived what you survived'.¹⁶⁸ Soon after, Sansa recalls Eddard's words: 'when the snows fall and the white winds blow, the lone wolf dies, but the pack survives'.¹⁶⁹ Sansa's power lies with the collective North, as in a pack of wolves. Notably, the term 'alpha male' referring to the power structure of a pack of wolves has persisted in mainstream pop culture and the media, despite scientists having long debunked this as a myth.¹⁷⁰ In the wild, there is no such thing as an 'alpha male' or 'alpha female', but rather packs follow one male and one female wolf because they are the mother and father of the rest of the pack. Much as House Targaryen identifies with dragons, House Stark identifies with direwolves and Sansa aspires to lead her people as a cooperative unit.¹⁷¹

There is also the argument that a feminine ruler who rose to power via feminine-coded power does not resist the patriarchal system in Westeros. Another ruler who uses feminine-coded power in Westeros is Sansa's maternal aunt, Lady Lysa Arryn. Academic study of Lysa has been limited to her parenting style, deemed overprotective and indulgent.¹⁷² Arryn's leadership, at first, seems to be akin to Sansa's: Arryn appears motivated by protecting her family and people, fleeing to the Vale with her son Robin shortly after her husband's suspicious death, and again when Arryn becomes furious that her sister Catelwyn has brought Tyrion Lannister to the Vale as a prisoner, exposing the whole area to the Lannisters' wrath.¹⁷³ However, Arryn lacks Sansa's coolness and is quick to lash out.¹⁷⁴ Additionally, Arryn's motivations appear to be solely based in fulfilling her own, individual goals, as opposed to the overall good of her people or the realm. This is shown when Arryn reveals that she poisoned her husband Jon Arryn (not the Lannisters, as she previously claimed) in order to prove her love to Baelish, the man who later murders her.¹⁷⁵

'I'm a slow learner, it's true. But I learn': Conclusion

Female politicians who lead without turning to masculine codified traits of leadership or power can be victorious in both Westeros and our non-fictional political world.¹⁷⁶ Adaptability is commonly

associated with female leaders and Sansa makes regular references to her ability to learn (slowly, but well) from those around her. This article distinguished between female leaders and leaders utilising strategies considered feminine. As in all countries (fictional or non-fictional), a female leader is no guarantee that a country or a political party has a progressive outlook or is subversive in its distribution of power or policy. As both Cersei Lannister and Margaret Thatcher show, female politicians who rise to power via a system created by and designed to reward men are not necessarily more liberal, more focused on social issues or more likely to support other women than male leaders.¹⁷⁷ I have expanded upon Clapton and Shepherd's ideas by including discussions surrounding corporeal styling, race, and sexual violence. Additionally, the only king on the throne in Westeros (Bran Stark) is positioned as an example of non-traditional masculinity, furthering the failure of masculine power in Westeros. Having seen Sansa win the Game of Thrones, viewers may more easily receive and appreciate women (such as Finnish Prime Minister Sanna Marin) in leadership positions.¹⁷⁸ Moreover, viewers might also pause when listening to an impassioned speech by a 'strongman'. A progressive woman in power, whether she is under a fictional direwolf banner, or a non-fictional head of state, is certainly on the path towards the destruction of patriarchy, and potentially other oppressive power structures. Perhaps nations should turn to leaders who lead collaboratively, based on feminine coded policy and power. The coronation of Sansa Stark in Game of Thrones not only makes it easier for viewers to accept and understand female leadership: it also helps viewers to see the flaws in 'strongmen', be they Trump or Targaryen.

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Mona Lena Krook
Rutgers University

In April, STAIR's Theme Section Editors interviewed Professor Mona Lena Krook, a Professor of Political Science and Chair of the Women & Politics PhD Program at Rutgers University. Professor Krook has authored and co-edited numerous books on women and politics, as well as scholarly articles which have appeared in *The British Journal of Political Science*; *Comparative Politics*; *The European Journal of Political Research*; and *Politics & Gender*, among others. Her first book, *Quotas for Women in Politics: Gender and Candidate Selection Reform Worldwide* (Oxford University Press: 2009) won the American Political Science Association's Victoria Schuck Award in 2010 for the best book on women in politics. The book also won the George H. Hallett Award in 2019, an award which recognizes a book published at least 10 years ago that has made a lasting contribution to the literature of representation and electoral systems. During our interview, we discussed questions of women's representation in politics, the challenges faced by female politicians, and the challenges and opportunities brought on for female politicians by the coronavirus pandemic. A particular highlight of our interview was our conversation about violence against women in politics, a topic which Professor Krook discusses extensively in a manuscript for a new book she is currently developing.

This interview was lightly edited for clarity.

St Antony's International Review (STAIR): To start, we were hoping you could tell us specifically about your research focus and elaborate on the driving forces that sparked your interest in your field. Is there a particular person or an experience—whether a historical or personal experience—that sparked your conviction that this field was something you wanted to research and learn more about?

Mona Lena Krook (MLK): I would describe my academic interests as being focused on all aspects of women's political inclusion, before, during, and into the future of their political participation. I went to university in the 1990s, when there weren't that many women in politics, so I was really interested in understanding how we get more women elected. At the time, I was really interested in work by political theorists like Anne Philips and Iris Marion Young who were exploring how to develop and support women's greater inclusion in electoral politics. As time went on,

Mona Lena Krook, "Feature Interview with Mona Lena Krook" *St Antony's International Review* 16 no. 1 (2020): 147-160.

and more and more women were elected, my interest evolved into looking at what women do once they are elected: do they take initiatives to try to forward women's policy concerns in the political process? What are the other things that they do when they hold these positions of political leadership? That subsequently evolved to really trying to think about the lingering barriers to women's full political participation. Obviously, there are still ongoing barriers [to getting women elected], but there are also the experiences of women who come into these positions and still encounter a really masculine aspect to the political world. This sometimes makes it difficult for them to achieve everything that they wanted, because they're still facing these barriers of sex and gender discrimination.

In terms of how I got there, my parents emigrated from Finland to the United States in the 1960s, so I was interested in learning more about politics over there. I had a professor in my second year at university who suggested I explore why so many women are elected into politics in those Scandinavian countries. I then got really passionate about researching it in the course of that semester. A few years later, I realised that I'd actually always been interested in this topic, from the time of being maybe ten or eleven years old. I had two favourite books growing up – one was about a girl whose mother ran to become the first female mayor of her town, and another was about a girl whose mother became the first female president of the US. These books were all about their gender barriers and gendered experiences in office. I think it's something I've always been interested in, and it became re-activated in an academic context.

STAIR: To start off, we wanted to look at your earlier work on gender quotas. According to recent statistics, eighty countries around the world have now adopted gender quotas, either at the level of candidate selection or parliamentary representation. However, women still only make up 23 percent of national parliaments globally. Why have gender quotas not been more successful in this regard? Given that much of the drive for the adoption of gender quotas has come from international organisations such as the UN, is there an argument to be made for the limited effectiveness of international recommendations in this sphere?

MLK: Just as a preface to my answer, it's interesting that people have different counts on the number of gender quotas. It depends on what you count as gender quotas. The way I count it, there are actually more than 130 countries that have some type of quota. Some people only count national level measures like reserved seats in parliament for women, and legislative quotas, which are laws that require all parties to have a certain share of female candidates. I also count party quotas, which are introduced voluntarily by individual political parties and are probably the most common form of quotas [although] it's harder to get data on them

because it's at the party level. Including these, actually more than half of the countries in the world have some type of quota. I would also say that the most recent data now show that women now make up twenty-five percent [of national parliaments]. This is fascinating when we look over time, because in 1995 it was about eleven percent; so, we're eventually seeing more than a doubling in the share of women in parliaments over time. Every year the Inter-Parliamentary Union (IPU) does a study of progress and setbacks in women's representation, and over these last few years it's seen an increase by several percentage points yearly in terms of the share of women elected. To jump to the question about why they haven't been as successful or have even been unsuccessful: looking at the same data, we can see a big difference between the countries holding elections that have quotas compared to those that don't. It varies every year but usually about twice as many women are elected in those quota countries than in non-quota countries, which is a pretty significant difference. So I would actually say that quotas have been fantastically successful in increasing women's representation.

If I go back to my own experience—which coincides with when the IPU started to post these online rankings of countries—in the 1990s there was only one country that had forty percent of women in their parliament—Sweden—but now there are least twenty countries that have forty percent, and three or four countries that have more than fifty percent of women in parliament. This is all related to gender quotas: many countries have made enormous strides in terms of electing women because they've introduced gender quotas.

The countries that continue to bring down the world average are those that haven't yet introduced them. There's still an interesting, I would say indirect, effect of quotas which is that in the course of talking about gender quotas and the importance of women's political representation – even in countries that haven't adopted gender quotas – there have been efforts to either introduce them or to introduce other types of measures to get more women elected, like fundraising for female candidates, trying to identify [candidates] and entering women for office. I did an article a few years ago with Pippa Norris where we looked at non-quota measures, which you can think of as complementing or substituting for quotas in some countries. Therefore, I think that quotas have played a really big role in directly increasing the share of women, but they have also indirectly started a global conversation about what political representation is and how to bring more women into politics. That said, the quota measures are a lot more effective than non-quota measures in terms of bringing women into politics, so this is where we still see a gap.

On the second question about international recommendations, I think what's really interesting here is that the international recommendations are coming from and are inspired by domestic trends in some parts of the world, particularly the Nordic countries, where women's

political representation increased so much earlier than elsewhere. What has happened in the course of making these global recommendations is that they have really strengthened the hand of domestic activists. You know it's really changed when you look at how national leaders think about women's political participation too, because there's a sense of falling behind — if women's representation isn't high, there's a sense of being 'backward'. My colleague Ann Towns wrote an interesting book where she focused on how developing countries are often those which are really taking the greatest strides in increasing women's representation.¹ In this way, it's about trying to be part of the wider global community and showing that they are also modern countries because women have rights to participate in their politics. I think that that's something that's not just imposed by global actors but is informed by and informs domestic level activism. The outcome of all of this is that the share of women in parliaments becomes one of the key global indicators of gender equality in many countries. I think it's something that countries are increasingly aware of—they care about their domestic reputation as well.

STAIR: Following on from that, do you think the trend of adopting gender quotas will continue in the future? Or do you think there will be a move towards improving women's substantive representation via other methods?

MLK: I still think that this is an ongoing process. However, I do think that the biggest wave of adoption has already occurred. It occurred between 1995 and 2010—1995 being when the UN held its fourth World Conference on Women in Beijing. The resulting Beijing Platform for Action called on governments to facilitate or foster gender balanced decision-making. We saw a huge domestic response to that in the form of many countries adopting quotas in that period. From 2000, the UN Security Council Resolution 1325 also highlighted the importance of gender-balanced decision-making in post-conflict countries. There are also events that can spark quota adoption. For example, interestingly in the years surrounding the Arab Spring, a number of countries in North Africa either introduced quotas for the first time or expanded provisions that they had adopted earlier. In this way, there are global moments where [gender quotas] can return to the agenda and be introduced further.

At the moment though, I think we're at the point where the question is really why the remaining countries aren't adopting quotas. Whereas before we were interested in explaining the outlier of adoption, now we have to explain the outliers of non-adoption. Even with developments such as the rise of far right and populist parties, I don't think this will impact the adoption of quotas because many countries already have them in place. I would also highlight the fact that far-right

parties coming to power have also elected women through quotas — so quotas are bringing women from a variety of ideologies into politics.

In terms of the long-term trend, I think there are two issues on the agenda. The first is the increase of existing quota provisions. In Latin America in the late 1990s and early 2000s, there was a big spread of gender quotas. First, there were legislated quotas of thirty percent and then, in the late 2000s, there was a move towards increasing those quotas from thirty percent to fifty percent. This deepening of quota provisions is a broader trend — fifty percent representation is increasingly the norm in countries adopting quotas for the first time. The second issue is violence against women in politics. I think this is an issue that has really come more strongly onto the global agenda in the past couple of years. This is because of the recognition of the limitations of quotas — you can bring more women into politics, but you can't necessarily give them power and it doesn't necessarily reduce all the resistance to women's leadership. It's fascinating that all around the world in the same period of time there has been a growing awareness about violence against women in politics, with people speaking out about the types of violence and harassment that female leaders are facing. I think this is keeping the issue on the agenda — the recognition that we need to get women into office, but we also need to find ways for women to gain the power to hold office and to be effective when they're there. What we saw in Latin America was the spread of proposals for legal reforms for violence against women in politics, and you're starting to see some discussions in other parts of the world about legislative and non-legislative measures to deal with it. To sum up, I think that quotas will be still on the agenda, or continue to be, but they've also inspired some of these new discussions about how to really empower women in politics.

STAIR: Touching on what you just began to talk about: thinking beyond quotas, many women may be put off from even thinking about going into politics as it's traditionally been seen as more of a male sphere, thereby affecting the pool of potential candidates in the first place. From your research, what factors have you identified as playing a role in deterring women from considering a career in politics? In what ways do you think ideologies of gender affect the nature of politics itself?

MLK: I'll start with the second part first. From the earliest days of feminist political theory, people talked about a public-private divide: the sense that there's a public sphere of politics and the economy, which is seen as a masculine space, and then there's the private sphere of the home and the family which is seen as a more feminine space. I think that the public-private divide has had huge implications for women's participation in the public sphere, from the early days of labour market participation and also in terms of their political rights. Even though people think that

we've advanced a lot in terms of women's empowerment, the impact of this public-private divide is still very important at a normative level, in shaping who is seen as a legitimate political leader. It also has a strong set of practical implications in terms of thinking about the ability to be active in both the public and private spheres at the same time. If you look at female politicians, there are often questions about how good of a wife or mother they are, – 'do they have small children?' and 'how can they combine work as a politician with their work and family life?' There's been growing attention by likes of the IPU but also Sarah Childs, a professor at Royal Holloway who's looked at the British parliament, and how parliamentary institutions are structured in ways that take the man as norm, or don't really think about women or caring duties as part of the remit of a politician. Thinking about things such as parliamentary working hours: if you start your working sessions at three pm and continue until late at night, it's seriously difficult to combine with having dinner with your family or putting children to bed. This is a problem that disproportionately affects women, although it can also affect men who want to be more involved with their families. I think this public-private divide has endured and is still really a huge part of the reason why women don't think about running for politics or political positions. It also makes it extremely difficult for them to stay in political office – it's really a huge barrier.

However, I think quotas play a really interesting role in trying to disrupt this a bit. When we think about candidate selection, the traditional model that people have thought about is the supply and demand model: who comes forward and who is seen as a desirable candidate. People who work on quotas have often thought about quotas as changing the demand for female candidates. When you have a quota, suddenly elites must look for women, and they must actively recruit women to include on their list, so there's growing demand. But there's also growing evidence that it's changing supply, so that women are more likely to come forward as candidates when quotas exist—this is because quotas suggest that politics is open to women. Therefore, I think it has an interesting impact on women's political ambition.

I did a study with Mary Nugent, one of my PhD students at the time, a few years ago on all-women's shortlists in the UK. We looked at some of the trends for seats that were designated for all-women shortlists for the Labour Party, compared to those that were not designated for all women's shortlists. We found that women were three or four times more likely to apply to be a candidate in all-women shortlist seats than in the open seats. When I went and interviewed some female MPs about it, it wasn't because they thought those were easier seats to get but because they thought sex discrimination would be out of the question. It's sort of taken out of the equation if you're competing against other women, you're actually going to get a fair go and people will actually look at your

merits. In this way, there was a clear awareness that there are still barriers, but it made it more attractive for women to put themselves forward as candidates when a quota was in place. Another way that quotas increase supply is that you suddenly have more women in the political sphere, so it's making it more likely that women see someone who inspires them to run for office or something that recruits them to run for office. Like, 'why don't you run for office? You could totally do this!' I think it has all these interesting down-the-road implications for changing women's political aspirations.

STAIR: So, you're saying that women have several barriers to deal with going into politics, and based on your recent research, violence against women in politics—not just politicians but also activists—is also one of them. This is perhaps not a concept that many of us are familiar with or have heard of before, so what is specific about violence against women in politics? Why is it not just violence against politicians, for example?

MLK: I'm glad that you asked this question. I just finished a book manuscript where I've developed several chapters on the subject, so there has been an ongoing debate in this emerging area of research. Just as a background, violence against women in politics is a very new global concept. In the book, I try to look at how it emerges in different parts in the world, and it's something that has been inductively theorised not only by female politicians in relation to their own experiences, but also by international organisations and NGOs trying to systematize women's experiences. There is not a lot of academic literature on it yet, so there are just a handful of people who have been working on it and trying to think about what it is. Is it a separate phenomenon? What are the basics? What is the definition? What are the contours of it?

Where I've fallen in this debate is to try and draw a distinction between violence in politics and violence against women in politics. I think violence in politics is pretty widely recognised as a problem for democracy. If you look at work on electoral violence or political violence, it's usually people attacking their political opponents and trying to find ways to, for example, commit violence against voters of the opposition. It's a way of distorting election results in your own favour, and so people think about it within this framework. If you go back to people like Anne Phillips, for example, she talks about this as the politics of ideas. It's about opposing political ideas and using violence to let your ideas prevail over the other side. We can see that as a problem for democracy, everywhere in the world.

Violence against women in politics is a challenge to a second trend that [Phillips] talks about, which is 'the politics of presence'. I would say that violence against women in politics is not about political ideas. Rather, it's about who can participate in the political process, so

specifically about keeping women out of the political world. Generally, people attack their political opponents. However, women are much more likely to be attacked by people in their own political party—and that's quite interesting because we know with violence against women generally, that women are most likely to experience violence at the hands of people that they already know. In this way, violence against women in politics is designed to stop women from being politically involved. And, if they are politically involved, it's to try to stop them from being effective. Given that this is something that people haven't recognised as a democratic problem, work on violence against women in politics has really tried to highlight that this is not a new, but rather a recently illuminated, barrier to women's political participation.

What makes it tricky to distinguish between these two, is that an individual female politician will experience both violence in politics and violence against women in politics. And sometimes these incidents could be at different points in time, but there can also be incidents where the two intersect. You are attacked because of your ideas, but people also attack you because of your identity. In the US we really see this as an issue for somebody like Alexandria Ocasio-Cortez. She's attacked for her political beliefs, which are quite left leaning in the US context. But she is also attacked because she's female, she's Latinx, and she's young. Before coming to Congress, she was a bartender and a waitress, so there is also a class-based aspect. It's not only about her political ideas – her way to discredit her political ideas is to say that she doesn't have a right to articulate them because of her identity. So, it's actually both of those things at the same time. You see similar things with Greta Thunberg – people don't like her ideas about climate change, and so they may attack her for being young, for being autistic, as a way of denigrating her right to say anything; to have a political voice at all. We know that those two things can intersect. But there's also a value in distinguishing those two aspects. So that's what we're really trying to do in talking about violence against women in politics.

STAIR: Would you say this is a gender-based issue or would this also be the case with, for example, ethnic minorities in politics?

MLK: I think it's definitely an intersectional phenomenon. In my book I talk about how violence against women in politics originates in structural violence and is manifested through cultural violence. It starts with those inequalities between people, and then it's really about trying to reinforce threatened hierarchies. So I think that that's true for gender but that can also be true for race, age, disability, sexual orientation, among other identities. We can see this in some of the research that's come out. The UK office of Amnesty International did a study of female MPs in the UK and found that Diane Abbott received by far the most abuse, but her abuses

[were] both gendered and racial in their content. Alexandria Ocasio-Cortez is a good example of that as well. I think the more ways that you challenge the existing power structures, the more of a challenge you are issuing by your mere presence. I think that's something that attracts a lot of the backlash, but then there's also the fact that being a feminist can attract a lot of vitriol as well.

STAIR: Would you say that the term 'violence against women in politics' will continue to be used in academia, or do you think it will change or evolve eventually?

MLK: No, I think it will still be used. It's still an emerging concept and I don't think it's been fully established. But I have a PhD student named Rebecca Kuperberg, who is working on intersectional violence against women in politics. She uses the word intersectional to think about the way in which sexism intersects with Islamophobia, anti-Semitism, or anti-indigenous sentiment. So, it's still about women in politics, but it's evolving to focus on recognising the diversity amongst women.

STAIR: And is this phenomenon of 'violence against women in politics', to jump back to the previous question, a result of higher visibility of women in politics? Or has it changed now that female politicians are perhaps assuming more non-traditional roles? It was mentioned in one of your research papers that female cabinet ministers are moving to more non-traditional roles, such as assuming the position of Minister of Defence rather Minister of Health and Interior, for example. Do you think it could be issue-based as well—women publicly discussing things that are more traditionally 'masculine'?

MLK: I've thought a lot about this to understand the question, 'is violence against women in politics on the rise?' I think awareness is what's on the rise, but we don't really know because violence against women in politics wasn't named as a problem before and so we don't have comparisons by which to measure it. I think that there are three possibilities. The first is that there's always been a silence, but we haven't talked about it or named it. We think of things like sexual harassment: that's a newer word, even though sexual harassment has always existed. So, is the same true with violence against women in politics? I am so intrigued by some of the information that's come out with the suffrage anniversaries in the UK and also in the US: that women who were involved with the suffrage movement faced a lot of violence against them, and it's really similar to what we see today. They're demanding women's political rights and then they're seen as challenging this public-private distinction, which can attract a lot of physical, sexual and psychological violence. Also, some veteran female politicians are talking more and more about experiences

they had in the sixties or seventies, but they just said, ‘Well, I didn’t say anything then because who would I tell? How would I articulate this to somebody?’

Second, we could also think about it as a form of backlash, which is really the way that people in Latin America thought about it. As I mentioned earlier, most of the countries in Latin America have a type of gender quota, so that’s how they’ve elected unprecedented numbers of women to office. They have the highest regional average around the world, and they see that increased women’s participation has inspired backlash—there’s an effort to try to push back the gains made by gender quotas, either by getting women to think twice about running for office or, if they do run for office, to get them to resign early, to make them less effective, to make them less likely to be chosen again as candidates. If you think about it that way, it’s a push back against those gains.

But then there’s a third explanation. This is the possibility that world context has changed in reaction to the increasingly new social media technologies, the growth in political polarisation, the rise of populism—all of this has really increased the vitriol in politics and has increased the tools you can use to commit it. So, it could be that it’s backlash, but it’s exacerbated by these other trends as well. It’s hard to say right now whether it’s on the rise or why it’s happening. I think it’s a little bit of everything. There was always resistance, but now it’s becoming clearer that women are challenged as their numbers increase. Then it’s also easier, because of social media, to attack these women.

On the question of contentious issues or non-traditional cabinet roles, I wouldn’t have enough to say specifically if that is the case, but there is a forthcoming piece by Sandra Håkansson in *The Journal of Politics* entitled, ‘Do Women Pay a Higher Price for Power? Gender Bias in Political Violence in Sweden’, and according to her study, men and women receive the same amounts of hostility in Sweden, but it’s when women achieve higher political roles that there’s a disproportionate increase in the share of abuse that they receive. It seems to be about women achieving these higher political positions. There’s also a recent piece by three Canadian scholars – Ludovic Rheault, Erica Rayment, and Andreea Musulan – that focuses on social media abuse towards American and Canadian politicians, and they find that women start to get a huge amount of abuse when they get to more powerful positions.² In this way, I think it might not be issue-specific, but actually specific to the level of power, based on what we know so far.

STAIR: Staying on the theme of a broader lens and bringing the issue of violence against women into it: in the current #MeToo and #TimesUp era, there seems to be a greater sense of positivity and openness which we’re now seeing a lot of in popular discourse. Specifically regarding the entertainment and the journalism industries, there is this idea that

violence against women is being noticed and is being addressed. Would you say that this movement, and all that's come with it—what many are reading as a cultural shift—has actually been as transformative and revolutionary as it is largely touted as being? Do you think it will lead to more accountability for those who perpetrate violence against women in politics? Or do you think that it is a movement that has in effect remained walled off from more conservative fields, such as politics and academia, and thus can't be deemed to be as transformative because it's currently only reaching certain industries?

MLK: I think it's actually hit on all industries in some way. In academia, there is now a whole #MeToo political science movement, so it's very much on the agenda in terms of academia. Our university has also changed its sexual harassment policy as a response to the #MeToo movement. In terms of politics, this is also something that I've been really interested in – it's more in some countries than others, but we have seen these #MeToo moments really transform and start conversations in countries like Canada and the UK in particular, but also in the US.

We have a Congressional Representative from California named Jackie Speier who has been trying for years and years to change the sexual harassment policy in Congress and it finally got pushed through in 2018. [#MeToo] tipped the balance in getting people to actually take the issue seriously. It used to be this incredibly onerous process: it had to be completely secretive and concealed information, and you had all of these incredibly long waiting periods that were all about getting the victim to drop their case. Now, it has been streamlined and you can no longer use taxpayer dollars in settlements—which is what people could do in the past. So, I think that [the #MeToo movement] has been something that's really hit every single industry. What is interesting about these conversations, though, is that it's become clear that politics is a more difficult arena in which to hold people accountable for these activities.

In Canada, one of the big issues has to do with parliamentary immunity, so it's been very difficult for MPs to be held accountable for their behavior towards staff members or other MPs. I know there has been a huge discussion about this in the UK in relation to all different types of employment categories, as well as in Parliament. It's this awareness of how employment is structured and what the rights of elected officials are vis-à-vis those who are not elected officials, or those who are volunteers or interns in their offices. I think the discussions have shown that it's even more difficult to get accountability for sexual harassment, and full and fair responses, in the political realm.

STAIR: You mentioned briefly the role of social media. It has certainly facilitated these global conversations about the experiences of women, but it has also made it easier to target women without perpetrators

necessarily being held accountable for it – harassment through an anonymous account, for example. How do you read the impact of social media on the experiences of female politicians, and how do you balance the positive and negative aspects of it?

MLK: I think it's certainly increased the number of channels [for abuse]. A Swedish politician said to me that even if it is the same number of people committing the abuse, it can *feel* as if there are more because there are more channels through which people can perpetrate it. She used to get text messages, phone calls, and emails, and now she's also getting social media abuse on top of this. And so, I think it has definitely become easier to use technology to harass people. Even things like additional technologies, such as Photoshop: I know in the US there have been efforts lately to test for 'deep-fake technologies', which increase harassment by altering videos, so it looks like someone said something that they didn't say. This obviously denigrates them during the course of the video, but also spreads fake news and increases the amount of harassment they receive from people who see those videos.

On the positive side, we can think about solutions, which is what I've been trying to think about in the research I've been doing. I was really intrigued by the way in which some female politicians have responded to social media abuse. Obviously, there's things like blocking and deleting tweets, but a growing number of politicians have decided to speak back. I think that AOC [Alexandra Ocasio-Cortez] is a great example of that. She'll take a piece of the [harassment] and just put it up there, and sort of highlight the people that are abusing her and call out or factually correct them. It's her saying, 'I'm not afraid of you, I'm not intimidated by you! In fact, it's going to make me work harder'. So, there are those individual women who are speaking up and pushing back against the abuse. There are also efforts to more collectively express solidarity with women who are being attacked in these ways. So, social media allows people to spread those more positive messages to politicians but also to other women who might be watching what's happening. The negative thing about new innovations is the ability to run away with new ways to harass people digitally, but I also try to think about how it has been used to take control and speak back to that abuse. I think that's going to be an ongoing challenge into the future for sure.

STAIR: As a final, macro-scale question: the COVID-19 pandemic is having a substantial impact on the direction of national or international politics. In the wake of all of this, there have been a lot of articles and analyses detailing the efforts of female heads of state and lauding all of the successes they have had during crisis governance during this time,

with many saying that the key to battling the pandemic might simply be to have a female head of state. Just as an example, Jacinda Arden of New Zealand has emerged as a particular shining star for implementing measures such as an early lockdown and widespread testing. Angela Merkel of Germany, Sanna Marin of Finland, and Mette Frederiksen of Denmark have also been praised for their leadership. In your opinion, might we see this trend as a dawn in the increased appreciation of female leadership, and how do you think this might also affect research on female leadership post-pandemic? As you mentioned earlier, one of the main questions that female leaders face is, ‘how are you going to balance politics and family?’ Do you think that this might shift the narrative, as we’re now seeing that female politicians are emerging as some of the most successful individuals managing this crisis, precisely because of these traditional ‘female’ characteristics, such as empathy?

MLK: I’ve been particularly interested in this coverage. I think that it’s really interesting how it’s become part of the narrative, really thinking about the implications of gender – and also race. In the US, for example, African Americans are much more likely to catch COVID-19 and to die from it, disproportionate to their share of the population. I think it’s just fascinating that people are actually attending to this issue. If you go to the front page of UN Women’s website, it’s completely taken up with ‘Gender and the Coronavirus’—just all different aspects of thinking about it in terms of gender differences, the role of women as nurses and grocery workers, people who are on the front lines of helping the public get through this moment.

But the political side is also really interesting [in that] there’s been a highlighting of the role of female leaders and how different it is from the way that male leaders are trying to posture themselves—particularly ‘macho’ leaders like Jair Bolsonaro in Brazil or Donald Trump in the US. The way that I read some of this coverage is that it really highlights some of the differences in the pattern of gender socialisation and the impact it has on women’s political leadership styles. There have been some really interesting stories on the Prime Minister of Norway, or the Prime Minister of New Zealand, holding special press conferences for children to speak about concerns that children might have about the coronavirus. It’s interesting that as women and mothers they think about children, whereas it wouldn’t even occur to someone like Donald Trump to address this from his leadership platform, even though he also has children. Your question made me think about a tweet I saw yesterday from Kate Manne. She’s commenting on one of these stories and she says, ‘it’s almost as if women are socialised to have a valuable skillset that includes careful planning, attentiveness, epistemic humility, cooperation, organization and care’, and it just absolutely captures this! There are things that have been seen as quintessentially feminine attributes, things that are the

result of women's traditional gender roles, and their perceived private sphere responsibilities. That's not something that should exclude them from politics—it actually gives them an amazingly useful skillset to be politically active.

This also goes for people who aren't mothers. For example, Angela Merkel doesn't have any children, but she's obviously been socialised as a woman, so she's bringing this style of politics and highlighting some of the skillsets that women have, which have not traditionally been seen as politically relevant. The coronavirus is highlighting that these are all important leadership attributes—in a crisis, but also in a non-crisis situation. We want our leaders to be empathetic and organised, to care about the broader populations, to think about the dimensions of care that are important to bring into policy. This begs the question of political ambition, to [be able to] tell women who don't think they are qualified to run for office that they already have all of these skills! Skills you didn't think would be helpful in politics turn out to be the most important that could possibly exist. It will be interesting to see how it affects women's decision to run for office. In the US, we've seen unprecedented numbers of women filing candidacies and running for and winning office in the past couple of elections, and I think [this crisis] might be the kind of thing that further boosts that trend across the party spectrum.

STAIR: I feel that this has brought together all of the issues we've discussed.

MLK: Exactly! Big questions like, 'why does it matter?' and 'why is it important that we all are invested in promoting women's leadership?'. I think it'd be better for everybody. I think we've only thought about one particular way of doing politics, and it turns out this other way might not even be just as good – it might in fact be better.

Notes

1 Ann E. Towns, *Women and States: Norms and Hierarchies in International Society*, Cambridge University Press (2010).

2 'Politicians in the line of fire: Incivility and the treatment of women on social media', Ludovic Rheault, Erica Rayment and Andreea Musulan, *Research and Politics* 6, no. 1 (2019): 1–7.

INTERVIEW WITH LITHUANIAN MP AUŠRINĖ ARMONAITĖ

Aušrinė Armonaitė
Chairwoman of the Freedom Party of Lithuania

A few weeks after our first interview with Professor Krook, the three Theme Section Editors had a conversation over Skype with Lithuanian MP Aušrinė Armonaitė. Ms. Armonaitė was appointed to the Seimas (Lithuania's unicameral Parliament) in 2016, and has also served as the Chairwoman of the liberal Freedom Party since its inception in 2019. Throughout the interview, Ms. Armonaitė discussed key areas of interest which drive her policy points, chief of which are educational reform, LGBTQ rights, and refocussing the Lithuanian economy to incorporate new technological innovations. The Freedom Party, she explained, is a party which was formed on the basis of human rights, and thus advocacy for equality underscores her policy across all realms. We expanded upon topics discussed in the interview with Professor Krook—a major one being violence against female politicians—in order to understand Ms. Armonaitė's experiences as a young female politician and to connect these experiences with Professor Krook's research. The interview wrapped up with a discussion on the implications of COVID for Lithuanian politics. Ms. Armonaitė shared that the new quarantine regime, while difficult in that it prevents any physical contact with one's constituents, has led to a blossoming online democracy forum in which party meetings and expert discussions have been embraced by a large number of Lithuanians.

This interview was lightly edited for clarity.

St Antony's International Review (STAIR): Could you tell us a little bit about your roles both as an MP in Seimas and as chairwoman of the Freedom Party? What are your main interests and priorities in these roles?

Aušrinė Armonaitė (AA): Currently, I'm a member of the Lithuanian Parliament. I work in the parliamentary group of independents. I used to be part of the Liberal political group, but [I] founded [a new] party last year—the Freedom Party—so I chose to leave them. I work on the Committee on Health Affairs in the Parliament as well as on the Committee on European Affairs. I'm also a member of the NATO [North Atlantic Treaty Organisation] Parliamentary Assembly—I'm a rapporteur in the Economics and Security Committee there. My top priorities in the

Parliament are much broader than my committees' fields because I work a lot with human rights issues. For our party [Freedom Party], human rights are one of the top priorities. So we have different policies in this very broad field, such as defending freedom of speech that is being under attack everywhere in the Western world [including] Central and Eastern Europe.

Then of course, different minority issues, LGBTQ issues and so on and so forth. Then education—it's actually another priority for our political party and for me personally as well. So many liberal parties before used to deal with the management or the economy of education. What's important for me and for us is what's going on inside the schools. What's the curriculum? We think that it should be changed, that we have to teach our children IT as a language, not as a separate subject. This means that IT may be used in different kinds of subjects, for instance music or geography or maths, and so on and so forth. I think IT is a kind of priority for the twenty-first century. It may mean coding, but it's not only that; we perceive it as a language. Then of course there need to be more changes, not only in the curriculum but also in the atmosphere of schools. So how do children feel, what's their emotional status there? In Lithuania our children are being bullied in schools a lot. I think that OECD [Organisation for Economic Co-operation and Development] data suggests that we are the 'champions' in bullying in schools in the whole OECD. That has to be dealt with. This is about education, of course there are more [issues that we deal with].

Then regarding the economy, we think that we need to take advantage of 'new economy' features, such as financial technologies. I believe Lithuania is now number two in the EU when it comes to financial technology licences, but there are more issues at hand. There is artificial intelligence, the internet, and other things like that. Liberal parties and liberal politicians in Lithuania years ago began talking a lot about having less bureaucracy, less regulation and less tax because it's centre-right on the economic spectrum. But [in the Freedom Party] we think that we need to bring more perspective to the economic policies and this taking advantage of new, twenty-first century economy features also has to be a priority.

The final priority is legalising marijuana, both for medical and recreational use. This is the most popular priority, both for me and for the party, because everybody agrees that we need to deal with education and to take advantage of these new economic tools, but when it comes to human rights or legalising marijuana, then we experience some cleavages. So I think that these priorities are more...unique, let's say.

STAIR: We were wondering if we could ask you a more personal question. How did you get into politics, and what motivated you to run as a parliamentary candidate?

AA: I was very active when I was at school. I joined lots of school organisations, I was part of the school parliament, I organised events and debates and so on and so forth. I did sports, I played basketball, I graduated from music school. So I got used to multitasking and being actively involved everywhere. I first thought that I would choose journalism [as a career] because I liked being among people and watching news and experiencing different things. But then when I was seventeen, I was looking for more activities and I joined the Lithuanian Liberal Youth. They claimed that they were a non-partisan organisation, sort of – so not just a political party wing. Much of the youth in different countries are part of political organisations, but this was not the case in Lithuania or with Lithuanian Liberal Youth. I joined them when I was a student. I became a chairperson and then the political party came to me and invited me to join and run for the European Parliament.

Of course, we knew that I wouldn't be elected because it was a huge election and I was basically unknown, so it was just for fun, and for the sake of new experiences I agreed to do it. But then the next year, in 2015, there was a city (local) election in Lithuania and I became a city councillor in Vilnius with the same political party, the Liberal Party. And then one thing led to another and here I am in the Parliament!

I feel that I'm useful here. I feel that despite being small—let's say young, not from a rich political organisation, and maybe not as influential as other politicians and other political organisations are in Lithuania—despite all these facts and realities, I can change something. I already experienced a lot that shows [me] it's possible to change things. When you begin to change the directions of certain policies, then it sort of gives you extra energy and you're motivated to do more and more and more and you never get enough of that!

STAIR: The focus of our issue is on the dynamics of gender in the international arena, including in politics. In Lithuania, women only make up 24% of the national parliament, which is relatively low compared to elsewhere in the world, and notably there are no gender quotas. Did you find that there were any barriers to entering politics as a woman yourself? On a related note, I saw that Lithuania had a female president for two terms—do you think this changed the political landscape at all?

AA: I think that we have equal opportunities, but something exists, as we say, between the lines. Something exists, some big elephants in the room, and I'm talking about this everyday sexism that you experience in many situations. Especially at the very beginning of my mandate here in the Parliament, I felt that many of my colleagues perceived me as inexperienced, 'young and dumb'. In other words, not as worthy as them. This happened not only among men, but I would say among my female colleagues as well. So when you come to the plenary meeting in the Parliament and try to present some resolution (on Brexit by

the way!), then they criticise not the content of your resolution but how you present, why you present and so on. This happened for me at the very beginning of my mandate. Of course, these are comments or observations that are probably not very proper. I'm a member of NATO Parliamentary Assembly so I have colleagues from all the allied countries. I wouldn't say that there is a different atmosphere there. I don't know whether it's defence, because NATO is about defence, or whatever else, but my experience here in Lithuania and in some foreign policy areas is the same—'you're young, you're a woman, so what's up with that?'.

I think what is also worth mentioning is that I have a very supportive husband. We met in the Lithuanian Liberal Youth and we've been together for eleven years. He's also very into politics but he's not active in politics. He supports me a lot and I think that he's a very important feature in my career because he pushes me. I know that there are many female politicians who don't have that kind of support, or else have children—I don't, at least not yet—so I think that it may be more difficult for them than me. I'm lucky in this case.

Regarding the female president, Dalia Grybauskaitė, she served for two mandates in Lithuania. One mandate is five years, so she served for ten years—an era. What I noticed was that she was very outspoken about women's rights and women's issues abroad and in some international conferences. I think she even used to be a chairwoman of Women Political Leaders.ⁱ Yet, in domestic affairs, she was not that vocal. I mean she dealt with the economy, with foreign affairs, but not so much about human rights or women's rights in particular. And I remember her giving a speech [at] a women's conference in Iceland, where she told her personal story—she's single and has no family and no children, and she said that it's difficult to tell a story to your voters or to your people in a post-Soviet, very traditional-minded country. But she had never said anything like that in Lithuania. I think it would have helped women's issues in general. She could have set some sort of aura around these issues, but she didn't. Despite this, I like her a lot and I think she really had balls! Now we have leaders that... some do not have them, even though they're men.

STAIR: So from what you've said, it's more the informal aspects of politics where you notice there's a gender issue. But I wonder what your opinion is on introducing gender quotas to increase female representation in the first place. Do you value that? Does it feature in your own party's programme?

AA: We have discussions in our party now because it's a new party and we are not really centre-right; I think we are more progressives, but it's not

i Women Political Leaders (WPL) is a global network of female political leaders, founded in Reykjavik, Iceland, in 2013.

really left. So we're like economic liberals with a very progressive wing on social affairs. We have all kinds of liberals, let's say. We have all these discussions regarding quotas in our party. My personal perspective is that quotas are not really feminist because if you are picked somewhere just because you're a woman it's not fair—I wouldn't like that. However, as I get older, I start thinking maybe, just maybe, temporarily it might help in businesses, introducing more women to leading positions. But generally speaking, I'm a sceptic regarding quotas.

STAIR: You touched upon it there, but would you say you are a feminist? If so, does it shape your politics?

AA: Yes, I would say that I'm a feminist. Ten years ago, when I was in university, I thought that feminism was something that we didn't need to emphasise and that it was not really relevant to our society or generally the current times. But then a friend of mine said, 'OK, Aušrinė, if [it wasn't for] these feminists, you wouldn't vote, you wouldn't run an NGO, you wouldn't have anything!' and I totally agreed with her.

In Lithuania, women got voting rights 102 years ago and it was one of the first countries in the world to do so. I think this was a very progressive step, bearing in mind that this country had just got away from the Russian Empire and had all these neighbours, those tyrants and so on, surrounding it. Sometimes I even feel that maybe those people one hundred years ago were more progressive than decision makers in current times. Because we had women in parliament one hundred years ago, already, and they ran for the president as well, actually—two of them. One hundred years ago. This is inspiring! But then having this everyday sexism at the Parliament [and] everywhere else, you start thinking whether we're going forward or backwards.

STAIR: On that point, do you think your experience in Parliament was shaped more by your age – because you were young, or because you were young and female? Do you have any comparison to young, male politicians?

I used to say—and I'm still thinking about that, actually—I used to say that it's a mix. It's like a ticking bomb, being female and being young at the same time. However, I then saw that our older and more experienced colleagues were mansplaining not only at me, but also at my younger, male colleagues. So, I think they also experienced some things like that. Anyway, I think that it is a mix.

STAIR: Do you think that there's also maybe a relationship to the issues that your party discusses? You said you focus very much on education and human rights, and these are generally seen as more feminised or more female topics in politics. Do you think that's also a dynamic, or do

you think that doesn't matter? For example, does the dynamic change depending on what you discuss in Parliament?

AA: Well, I'm not sure. I don't think this is really some sort of relevant thing. Maybe human rights, maybe LGBTQ+ rights specifically. Because, you know, LGBTQ+ advocacy—although now it's changing—used to be a very female thing. Because, to 'defend those gays', it has to be a woman doing this because, if you're a man defending them, then you're gay. This used to be a reality in Central and Eastern Europe for many years. Now, of course, it has changed a bit because we have openly gay politicians and so on and so forth. I have also played a role in changing that because in our Freedom Party, we have openly gay or openly lesbian politicians who will hopefully be elected to the Parliament. So yes, I would say that LGBTQ+ issues do trigger some of the comments.

STAIR: In your work, are you in contact with other female parliamentarians from other Central and Eastern European countries? The issue of LGBTQ rights in particular is way more polarised in countries like Poland—do you think Lithuania is very specifically liberal in this regard?

AA: Well...let's talk about Lithuania. I think that Lithuanian society, it has changed faster than the decision-makers and their minds. When I go and visit schools and have discussions about different kinds of topics, I see that our pupils, and children more generally, are more liberal, broadly speaking. They don't see LGBTQ+ issues as some sort of stigma. They are more inclusive of their peers who may be LGBTQ+. And our politicians, I don't think they realise that society has changed—we have LGBTQ+ culture and Vilnius is also a very welcoming city. Baltic Pride is the city's festival, right? So they are still not dealing with the real problem.

For instance, we still don't have civil partnership, and this is shameful for me. I think that [politicians] don't realise that everything has changed years ago, and the society understands and accepts LGBTQ+ people more. Then, regarding other countries – I wouldn't distinguish Central and Eastern European partners. We have partners in Estonia, but we discuss not only human rights issues, but every other topic. We have new partners in Latvia as well, because they have a new liberal party. And then Poland, yes, we also have contacts there, but now they are split and very divided among liberals, so it is more difficult. Poland has the biggest problems regarding liberal democracy and its pillars nowadays. Sometimes I can notice echoes of what's going on in Poland here, but hopefully we will change that this fall because we are having elections.

STAIR: This brings me right to my next question, because we have recently talked with an American academic at Rutgers University, Mona Lena Krook, for our other interview. She does a lot of work on gender

quotas, but mainly focuses on violence against women in politics. And she brought up exactly what you had said before, that violence against women in politics is not specifically always physical or visceral verbal violence, but rather criticising a woman in politics. This is not necessarily because of her political opinions, but other things relating to her as a person. What was interesting in that conversation is that she said this quite often happens within the party, and not necessarily across parties. I was wondering what your experience has been like within your own two parties that you've been a part of thus far?

AA: In our current party, just because we were born as a very progressive movement, and we were basically building ourselves in opposition to exactly what you just indicated, there is no sexism—at least, I haven't experienced it yet. Of course, there is bound to be some kind of sexism. It's impossible not to have it right? But, it's not significant. It's not good to disrespect any of your colleagues, whether they are women or minorities. In my party, this would be condemned and reacted to. In my previous party, the Liberal Party, it's a bit of a different situation because it's an old party, so this means that here is some sort of establishment with older and more experienced politicians. Politicians in the Liberal Party come not only from cities (my current party, by contrast, is most popular in Lithuanian cities), but also from rural areas. Rural politicians are often more traditional. Sometimes, I didn't even understand why they called themselves liberal, because they were not! So of course there was some open sexism there. Not only sexism, but also questioning your competency because you're not experienced enough. For example, 'don't push this motion in municipality X because, don't you know, I was a mayor for 21 years there, and I know better!'. How would I describe that? It's not exactly sexism, but it's some sort of... presenting yourself as being much more competent and preventing those younger than you from initiating something. So that's what I experienced there.

STAIR: Something that our previous interviewee also mentioned in terms of abuse of female politicians was that a lot of it comes through social media now. She gave the example of a Swedish politician who told her that even if the amount of abuse she receives is the same as before, it feels like there is a lot more on social media. Since you're very active on social media, what do you feel is the relationship between social media and politics/politicians in Lithuania? Do you feel that this is a troubled relationship, or one which is more positive?

AA: Instagram, I feel it's quite positive. I mean maybe, probably, I'm in the bubble. I've got more than five thousand followers so of course, in comparison to some politicians in the UK or the US, it's nothing, but we're a small country, so it's something in Lithuania! I feel 'Instagram-

safe'. I haven't experienced any attacks. I mean, some, but then you block a person and it's nothing significant. Maybe twice. Once, my Instagram was under attack by the Russian trolls, but that's a different thing.

Then, Facebook... Facebook is a bit different. Of course, you're also able to block a person who attacks you, so I do that. I receive messages that are not friendly, and I think that some of them might even be sent by colleagues. Or some of these messages are also related to other political organisations, so they can get under your skin and make you feel unsafe. This is my theory so it may not be true, but I do think they could be sent by our competitors. I wouldn't say that I experience a lot of attacks on social media. If I do, I block the person and I don't give a damn about it! I don't consider it as something very important.

What is important to stress, I think, is comments in digital media. For example, we have websites that are connected to our news outlets. There are articles about me, or written by me, or interviews with me and about my initiatives in the Parliament, and you can comment on them. I almost never read them, but my husband reads them, and my mother reads them, my friends read them, and they say that on these websites, people are cruel. For instance, some of them say that, just because I am an advocate for LGBTQ+, that I am a lesbian—this is fine by me, not an insult. Then, they are also spreading propaganda about me that, for instance, my grandfather used to serve in the KGB, which is not true! It's fake news! And I think that these sorts of comments are not motivated by me being a woman, but by me being a very pro-Western politician. They want to put some sort of shadow on me. And there's also, 'oh this woman, she screams a lot in the Parliament! She's a hen!' and so on and so forth. So most of these comments I think are not coming from social media, but rather from these 'digital media' forums.

STAIR: So it's sort of a blend of things that people don't like about your policies and also there is a gendered frame that might be on top of that, but might be separate. It's not just people who don't like you 'screaming' in Parliament, but also those who dislike or disagree with your policies. It kind of runs the whole spectrum.

AA: Yes, and I remember a comment that was just made this past week, something along the lines of, 'oh, I can't listen to her! When I hear her in the Parliament, her voice is so loud and this...'. We have this very impolite word for a woman, it's called 'boba'. I don't know how to translate it exactly...well, essentially 'this boba, I can't stand her!' So it's everything—they don't like my policies, they don't like how I look or how I sound!

STAIR: Can I ask how much of an insult that word is in Lithuanian, since it's difficult to translate?

AA: Oh, it's an impolite word for sure! People might use it to describe a man as well, but it's more like... how to put it... it's not only about your appearance, but also about your social status. Actually, you're raising a really good question here! I don't know how to describe it in Lithuanian or in English. How does one properly describe the concept of 'being boba'?ⁱⁱ

STAIR: I imagine all of us will be looking it up later today! On a slightly different topic which also touches on social media and technology—since COVID-19 has moved our lives increasingly into the digital sphere, how would you say that the pandemic has affected your work as a politician? Per your Instagram, we've seen photos of you showing up to Parliament sessions with a face covering and socially distancing as much as you can, but how would you say that the pandemic has impacted your ability to do your job as a politician?

AA: Basically, under the quarantine regime, you have to do everything that politicians normally do, but somehow do it in the opposite way. I mean, all public events are being cancelled, you can't go door to door shaking peoples' hands—everything that politicians do, it's impossible to do now! The personal contact, I really enjoyed it. I think that's how I got elected—going door to door and meeting people, going to different events and such. So we're having elections this fall and I can't even imagine what it will look like. For instance, in September, will we be allowed to do the normal things that politicians do, or not? However, being online and having our voters also online was a good thing for us because we have basically put all our events online—everything! From domestic party meetings to very open meetings with experts and other discussions—all of it, we're doing it online.

So sometimes, I feel that it's even better, because then you can reach people at the same time and on the same topic, from all different places in Lithuania and even across the world, and you can all discuss together. I think it's a great possibility for the future. We are even going to organise a party assembly on the 13th June online. There will be like five hundred people that will join some platform, and we will all come together to discuss political issues. A person joining the discussion might be in the kitchen, in his bed, wherever. As Churchill once said, 'never waste a good crisis'!

STAIR: And would you say that the pandemic has affected the views of your constituents, or of Lithuanians as a whole, regarding your policies

ii Ms. Armonaitė contacted STAIR after the interview to explain further: 'In Yiddish "baba" or "babi" [or "bubbe"] means grandmother or older woman. Some Lithuanians still call their grandmothers "baba", which is positive. In this case, however, it's maybe like a "hag" but "weak men" may also be called "boba".'

or ideas, if at all? Do you see, for example, that people are becoming more accepting of progressive ideas such as widespread social safety nets, or maybe becoming more trusting in government as politicians are responding to this crisis? Conversely, are you seeing the opposite—that there is a backlash to your policies and government crisis management?

AA: In the long run, it is too early to tell how people will perceive our government policies or our ideas. When the crisis had just begun, I thought, ‘okay, this is it! It’s the end of liberal democracy and liberal values. People just want borders to close, to stay at home, for businesses to stop. They just want to be with their own people and that’s it’. I was very cautious of what the future would bring.

But now, when we have softened the quarantine regime and I see how many people are looking for freedom and yearning to go to an outdoor café or to hang out with their friends, despite the necessity of a two-meter distance... now I’m saying, ‘OK, it’s in our DNA to look for more liberties and to be among people’. I think this crisis has shown that we need others, and that we need to respect others. We need businesses to run, and we need to help them run. I think it’s all about being liberal now. When we started our interview, I was talking about learning IT and coding as a language.

And I think that’s also very important, because everything is now online, and teachers have to teach children online, so we need competency in this realm. Our children used to just play with these devices, and now they have to learn on them. So I think it’s quite important that our party and our policies are becoming more and more relevant. And it feels as if we have, all of a sudden, arrived into the future—we are in the future now, a totally new reality.

STAIR: Wrapping up now on a more philosophical note about the future of politics, what advice would you give to other women who want to go into politics, and what would you want them to know? Obviously, there are circumstances which are unique to Lithuania and are not necessarily relevant to the reality in, say Latin America, but what pieces of advice or lessons have you taken on throughout your career that you feel would be valuable for people to know, either in Lithuania or more broadly writ?

AA: My advice is not to be afraid of anything. I know that many women, but also young people more generally speaking, are afraid. Often, it’s fear surrounding some big decision, like going to some university or making some big decision in your life, but a lot of times it’s also a fear of taking the floor. I don’t know whether you guys experienced that—whether you *girls* experienced that—but I’m just thinking of myself, too. There were times that I thought to myself, ‘well, do I need to take the floor and say something, or should I just let someone else say it?’ And then what

happens—you don't take the floor so someone says your point first, or else they take the floor and start speaking total nonsense and then you think, 'OK, I should have spoken'! So that's why I'm pushing myself every day to just not be afraid of anything, whether that means taking the floor or leading the party or establishing a new one.

A friend of mine once told me that he makes his decisions based on his end-of-life perspective. When you imagine yourself being old, and then you reflect on the decisions you have made throughout your life—whether you were right or wrong, and how you feel about the choices that you made. So, when I do this exercise, then I realise what I need to do. I think this is important: to be brave and not be afraid of anything. We have a hip hop song in Lithuania, it has a line which goes, 'those who scare everyone else are in fact being scared by those who are not afraid of anyone at all'. It just shows that those who we see as being very influential—those who are famous, or those who are rich and powerful—they are afraid of those who are fearless. So just be fearless, and everything will follow.

STAIR: And so finally, where next? Where do you plan to go from here? Do you have a vision of yourself in, say, ten years, or are you just planning to take it one crisis—and one pandemic—at a time?

AA: On a shorter perspective framework: we have just established our party and are preparing for elections this fall. Polls are not very friendly to us and we are striving for survival, but we are brave, we're straightforward, we're radical (in a good way), so I think we will be in the next parliament for sure. But this is our goal now, to strengthen the organisation and to participate successfully in this fall's election. Now about the longer run. I'm not sure whether I will stay in politics for my whole life.

I'm a millennial, so I think I might want to mix my career up. For example, I want to run a ministry or hold an executive position. I want to shape something and create something, not just react to someone's execution of a political idea or point. It would be very interesting to be in an executive position and to be shaping policies here in Lithuania. But then of course, the international arena is also interesting. There are NGOs and there are many other organisations. My husband now works in Rwanda and I haven't seen him in two months, despite the fact that we had plans to meet in Africa and then in Europe. Now all of those plans have fallen through so I don't know when I will see him!

Anyway, I'm thinking that an international career is also something worth pursuing after ten or fifteen years. Just yesterday, we had the hundredth anniversary of the Parliament in Lithuania—so it's one hundred years of the Republic of Lithuania. People left some messages for future generations, and I just read them here in the Parliament. And

I started thinking, 'okay, so what am I doing here, what's my role here?' They established a modern country, they gave some basic human rights, they established a republic, so what am I doing here? What I want to do is to put human rights as a focal point in Lithuanian politics, to have this become a strong direction that won't be changed and that will be defended. Not only by politicians, but by citizens themselves, because it's about them, these are their rights! So human rights more broadly speaking, but also more specifically speaking—about minorities, about LGBTQ+ individuals, about women's issues, disability issues. This is what I think we lack in Lithuania now, and I can change that, so that's a broader goal and I hope that in one hundred years, no one will deal with the same problems that we're dealing with now.

DOES INTERNATIONAL RELATIONS NEED AREA STUDIES?

Editorial Introduction

Cody Bock, Gülce Özkan, James Sweetland, and Aman
Thakker

For STAIR's fifteenth anniversary edition, we give renewed importance to a decades-old debate in the social sciences: the role of regional knowledge within the broader IR discipline. In doing so, we welcome the contributions of some of Oxford's foremost scholars in Area Studies and International Relations. These scholars have diverse regional specialties, but they come together in this guest section to highlight the role of regional knowledge in contemporary IR scholarship, call for research which transcends the global-local dichotomy, and offer a road map for the 'decolonisation' of IR.

Louise Fawcett begins the discussion with her account of how generalising theories in International Relations have failed to understand regional outcomes in the Middle East and North Africa. She argues that generalising theories within IR must be 'regionally informed' in order to remain relevant. Todd Hall, too, subsequently emphasises that IR theory must be accompanied by regional knowledge in his article on the shortcomings of 'generalist' IR research in China. His contribution cautions against essentialising and surface-level scholarship, and argues for a higher standard which comes from familiarity with the region being researched. These more region-specific discussions broaden into a larger examination of the discipline in this guest section. Andrew Hurrell does this by taking a step back to explore the historical interaction between Area Studies and International Relations. He exhorts the necessity of knowledge from the ground to inform IR debates, and offers a road map for resituating such knowledge within contemporary IR scholarship. In her contribution, Kalypso Nicolaïdis writes of the potential for IR to assist in the efforts to decolonise IR and academia at large. She notes that Area Studies, in embracing Europe and the US as regions to be studied like any other, can be crucial to ongoing efforts to decentre hegemonic Western epistemologies. Finally, Kate Sullivan de Estrada rounds out this guest section by addressing the supposed danger of regional specialism: siloisation. She argues that exceptionalism is at the root of such siloisation anxiety, and while exceptionalism may indeed be a source of epistemic domination, it can equally serve to resist and revise dominant,

generalising narratives. Altogether, these five articles offer a multifaceted description of IR scholarship today, and they put forward an argument for the relevance of Area Studies in International Relations, especially as it pertains to contemporary calls to decolonise the discipline.

In building on the written contributions of these five scholars, STAIR interviewed Professor Amitav Acharya, UNESCO Chair in Transnational Challenges and Governance and Distinguished Professor at the School of International Service, American University. Professor Acharya has been a prominent voice in the discussions over how academics and scholars can bridge the divide between Area Studies and International Relations, and he has been a pioneer in the emerging field of Global IR scholarship. While he notes in the interview that the 'area studies/discipline debate was to some extent a false debate, overstated, very US-centric and while it may persist to some degree, it has lost its relevance', he underscores how there are growing opportunities for Area Studies and IR to be allies today, particularly in rigorous empirical work on topics such as regionalism, regional order, nationalism, revolution, development, and power transition. He also outlines the impact of COVID-19 on both the ability and lack thereof to conduct 'digital fieldwork', and on how regional responses to the pandemic create an opportunity for area studies specialists to explore new actors, topics, and approaches. Finally, Professor Acharya leaves six pieces of sage advice to graduate students and early career researchers – many of whom are STAIR authors – on how they can traverse the Area Studies/IR debate.

The STAIR editorial team is proud to present this guest section and bring renewed interest to the interaction of regional knowledge and IR theory. STAIR has engaged scholarship in both Area Studies and International Relations over its fifteen-year history, and the very relevance of this journal will rely upon its contributors and readers continuing to engage with this debate. Indeed, we find, as our contributors do, that the possibilities for IR can only be expanded with the exploration of the questions presented here and that the current calls for decolonising academia – both at Oxford and in universities around the world – make urgent such explorations.

Contributor Introduction: Does International Relations Need Area Studies?

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Louise Fawcett, Todd H. Hall, Andrew Hurrell, Kalypso Nicolaïdis, and Kate Sullivan de Estradaⁱ

Thirty years ago, to study the international relations of an area was mainstream. Today, with the turn in International Relations (IR) and Political Science away from historicisation and contextualisation, scholars and students in the so-called 'mainstream' of the discipline confront a greater need to justify an area focus in their research. While much of the recent debate about the place of Area Studies within Political Science has focused on comparison and on comparative politics, only some of these concerns have carried over into IR. Conceptualisations of connectivity and the global; what counts as an area in IR, to whom, how, and why; and how we might reconstruct dominant modes of theorising in our discipline through a serious engagement with areas, all demand sustained attention. At a moment of 'reconvening' the discipline, embodied in the project of Global IR, this forum presents a set of distinctive yet interlinked answers to the question of how the localised study of 'areas' (understood as including North America and Europe) matters to IR.

As five contributors who share an institutional centre of gravity and a common commitment—the University of Oxford and the defence of pluralism in IR—we find ourselves not only at a moment of disciplinary reformation, but at a wider moment of reckoning. This forum's publication against the backdrop of renewed student and faculty activism around our University's past, particularly its legacies and memories of slavery and colonialism, serves as a potent reminder: the study of IR at Oxford, as in many other universities grown out of colonial and imperial centres, has distance to travel in the diversity of its faculty and, with some recent and encouraging exceptions, the coverage of its curriculum. Across sites of knowledge production and across the producers and reproducers of our discipline, the wider project of reconvening IR also demands a foundational shift in the frames through which we work, and it is here

ⁱ This forum emerges from a panel session at the 2019 ISA Annual Convention in Toronto. We would like to thank Neil MacFarlane for early inputs into our conversations, and Amitav Acharya for his generous and searching role as chair and discussant in Toronto. We are also grateful to the three reviewers of this forum whose detailed and excellent feedback we have sought to incorporate as far as space allows.

that we place our focus in this forum.ⁱⁱ

Situated in and reckoning with the history of Oxford as a flagship centre of IR and Area Studies in the UK, Europe, and the world, the pieces that follow debate the mutually dependent relationship between IR and Area Studies, a relationship forged in the shadow of empire and the Cold War. Drawing on what for most of us has been a long, prior engagement with Global IR, Area Studies, and a decentring agenda, we suggest new pathways forward. At the same time, we recognise at this pivotal moment that we are at a new beginning. There is much to learn, both as we aim to include others and as we hope for our own inclusion in rich debates taking place elsewhere—in other places and disciplines, some of which we draw upon below.

ii Our thanks to one of our reviewers for underscoring the importance of diversity in the producers of IR scholarship and to Nayanika Mathur for her insight that disciplinary self-examination must accompany such efforts. See: Nayanika Mathur and Liana Chua, 'Introduction: Who are 'we'?', in: Nayanika Mathur and Liana Chua, eds., *Who are 'We'? Reimagining Alterity and Affinity in Anthropology* (New York: Berghahn books, 2018), 1-34.

INTERNATIONAL RELATIONS AND THE MIDDLE EAST: BRINGING AREA STUDIES (BACK) IN

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Louise Fawcettⁱ
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Abstract

The call for more dialogue between Area Studies and International Relations has gathered momentum and is particularly relevant to today's Middle East. The revolutionary events of the Arab uprisings, the volatile regional balance of power, and the performance of regional institutions are just three examples of where the fields of Middle East Studies and International Relations intersect and demand constructive scholarly engagement. And while scholars have responded to this call, much more needs to be done to break down disciplinary divides. As a recent symposium on this topic demonstrates, the origins and outcomes of the Arab uprisings 'have been manifestly and profoundly shaped by international factors, with which IR theory has yet to fully engage.'¹ This paper first offers some reflections on the state of the International Relations-Area Studies debate and then moves to examine some Middle East-specific cases which illustrate this point. In doing so, it shows how 'bringing Area Studies (back) in' helps to contribute to the decentring of International Relations or making it more global.² Indeed, 'decolonising IR' as an inherently Western-centred discipline cannot take place without serious engagement with Area Studies scholarship which provides a 'road map' and tools to engage with alternative sites of knowledge.³

What's the problem and how to fix it?

The general reader might rightly feel bemused by the bigger question posed here. Surely all International Relations (IR), if it is indeed *International Relations*, depends to some degree upon the study of 'areas', or at least clusters of states in areas and their inter-relationships.

The world, for all the claims of 'globalisation', or to use the latest buzzword, 'connectivity', is a collection of areas or regions with often quite distinctive properties—not watertight compartments, to be sure, but belying any notion that the world can be treated as

i This paper draws on Louise Fawcett, "Introduction: The Middle East in International Relations," in *International Relations of the Middle East*, ed. Louise Fawcett, (Oxford: OUP, 5th edition, 2019): 1-17.

Louise Fawcett, "International Relations and the Middle East: Bringing Area Studies (back) in," *St Antony's International Review* 16 no. 1 (2020): 177-183.

one seamless whole. 'Universalism in the study of world politics', as Laurence Whitehead writes, provides 'a flat view of political reality'.⁴ In *International Relations*, the local and global are in constant dialogue, as contributors to this section show. The region known as the Middle East and North Africa (MENA), at the heart of key global problems and issues, demonstrates well the importance of maintaining this interaction and resisting disciplinary divides and silos.

Interestingly, the title question would not have been posed fifty or more years ago, when both IR and Area Studies recognised their then, highly interdependent, relationship. Interdisciplinarity was a by-word for interwar IR exemplified by the English School, drawing as it did on history, political ideas, law, and diplomacy.⁵ Early IR accommodated the study of world regions and their societies and histories even if these were viewed then from a predominantly European perspective. In the Cold War, as that perspective became an increasingly US-centred one, Area Studies consolidated its place in IR, not least because areas were important as sites of influence and control.⁶ Many students of that time studied an area—the Middle East in my case—as an arena of Cold War competition.⁷ However, as that competition waned, interest in areas diminished accordingly. Such was the early post-Cold War hubris of the West, that some proclaimed that the Third World no longer mattered.⁸

Such 'mattering' was selective, however, as Benedict Anderson writes: 'if a country or region is regarded as a "problem" then area studies gets more airing. China studies is fine... Islamic studies is fine. African studies doesn't matter'.⁹ The Middle East, an area with continuing geopolitical relevance, whose conflicts spilled over borders, still commanded world attention, albeit with varying results. Meanwhile, to compound the problem, mainstream IR increasingly rejected interdisciplinarity in search of more generalising or universal theories and scientifically grounded explanations, contributing to the flattening phenomenon referred to above. Now characterised by 'isms' and grand debates alongside the growth in quantitative methods with large-n studies, area specialists, like international historians, were pushed to the margins. Area Studies, for its part, chastised for its failure to be policy relevant in the face of major events like the Iranian Revolution, the 9/11 attacks, and the Arab uprisings, retreated into narrower specialisation. Indeed, the Middle East provided evidence of where Area Studies was seen to have 'failed'.¹⁰

This state of affairs—the retreat of Area Studies from IR—has continued despite notable efforts by some scholars and the fact that the world, and our understandings of it, have visibly changed, meaning that those areas once believed to be at the centre of the theory and practice of IR—and indeed at the centre of the world—no longer hold such dominance. A multipolar world is a reality today. This fact should make us question the privileging of perspectives and understandings that come

from only one pole. The so-called ‘Third World’ (to use Cold War language) matters today just as much as the former ‘First’ or ‘Second World’; all demand equal attention. The fact that labels like ‘Third World’, ‘less developed countries’, or the ‘South’ exist is indicative of the persistence of hierarchy in IR and the othering of areas that do not belong to the West or North. And it is not just the areas themselves that are othered—it is also their potential contributions to knowledge and understanding. The emergence of a Chinese IR school has shown precisely how such othering might be addressed.¹¹ One of the novel features of the Chinese-led Belt and Road Initiative is precisely that it offers an alternative vision and perspective, not only of older ideas of interdependence, but of the foundations of IR itself. Billed by the World Bank as ‘an ambitious effort to improve regional cooperation and connectivity on a trans-continental scale’, it places China at the centre of the world.¹²

The reference to China reflects its uncontested position as a major pole in the contemporary international order, though it is often presented as a challenge to that order and its institutions, but China is representative of one world area or region that both demands attention for its contributions and has the potential to reset or to ‘decentre’ IR. The same may be said for Africa, Latin America, or the Middle East—all regions which, historically and at present, offer unique and alternative perspectives on the international and contribute to the assembling of global IR. It is time for IR to catch up with the world as it is, embrace the meaning of the word ‘international’ in its broadest sense, and re-engage creatively with more plural approaches and understandings. The demand to decentre IR has been growing in recent years, though, as Andrew Hurrell points out, identifying the problem has not produced a common response on how to achieve this, or how best to study global IR.¹³ The loosening of disciplinary boundaries, particularly in respect of Area Studies broadly conceived, is an important part of that endeavour—of which studying a region closely and learning its languages, for example, is an integral part.

In making the above argument, it is not necessarily the case that a complete deconstruction is required, though some critical and post-colonial scholars would argue that the very language and history of IR militate forcefully against the equality of states and peoples.¹⁴ A less radical and incremental approach, following the work of scholars who advance the global IR agenda, is to open up and progressively break down and reconstruct hitherto dominant modes of thinking. Global IR is an invitation to accommodate a plurality of views and perspectives on any given question, both to rethink and ‘think past’ Western IR, as Pinar Bilgin has argued.¹⁵ Such an exercise is unlikely to result in the tidy or parsimonious theorising beloved by IR theorists. It requires the hard work of ‘analytical eclecticism’: to explore connections between different paradigms to generate new theoretical insights.¹⁶ Work at the interface

of Area Studies and IR is necessarily both eclectic and interdisciplinary, combining as it does the rich contextual analysis of Area Studies with the cross-cutting logics of IR theories and approaches.¹⁷

Lessons from the Middle East

Studying the particularities of the Middle East as one of a number of areas operating within an overarching global structure, is particularly helpful in informing the whole and unsettling dominant theories.¹⁸ Whether we consider the making of states and institutions, regional security, or the balance of power, the Middle East provides its own unique contributions and insights. The Middle East came late to the international system and on terms dictated mostly by others; its very territorial extension was defined by Western powers. Even to the most casual observer the particular problems attendant on post-imperial state formation require thinking 'beyond Westphalia'; wars and alliances cannot be stripped down to any neat, realist model, but neither can the International Relations of the Middle East be simplified into a constructivist narrative, which has served to compartmentalise and (re-)essentialise MENA, bringing orientalism back in.¹⁹

Speaking of state formation, MENA shows how the Ottoman Empire, a once stable and prosperous imperial domain, and the envy of other world powers, became a fragmented post-colonial reality—a zone of predation but also of opportunity—with consequences for IR theory and practice. But this is not a simple story of external penetration and the construction of artificial, later to become 'failed', states. Rather it is a story of how both old and new states emerged into a competitive international society that was both hostile and facilitating to their emerging power. From Turkey's extensive refashioning after Ottoman collapse and Egypt's leadership role from the 1950s through the 1970s, which extended far beyond MENA, to Israel's tenacious state and nation-building and Iran's rise alongside the parallel emergence of the rentier states of the Gulf, the Middle East has seen the production of strong states. True, the 2003 Iraq War and the subsequent Arab uprisings have exposed symptoms of state failure (which civil wars do not?) but the overall picture remains one of state durability, challenging the notion that the artificial and colonial origins of MENA states have simply left them chronically weak, prone to collapse, and ripe for continuing intervention.²⁰

In considering strong regional powers and regional alliances, the MENA case is illustrative in other ways. External powers are highly instrumental in influencing regional outcomes (think of Iraq, Libya, or Syria), but regional states themselves can be powerful 'veto' players at the regional and international levels, as Iran's negotiations over the nuclear issue have shown. And the capacity of regional powers to

reshape alliances along new lines to suit their purposes, cutting across traditional Arab-non-Arab divides, and to instrumentalise sectarianism is illustrative of an extraordinary agility to balance regional threats and bypass supposedly deep-held ideological positions, whether in respect to supporting co-religionists or aligning with long standing enemies.

In the case of Iran, the contrasting positions of scholars is illustrative. There are two dominant narratives. On the one hand, Iran, past and present, displays many of the elements of a highly pragmatic regional power, asserting its authority and leadership both regionally and even globally among its allies. On the other, Iran is portrayed as irrational, revolutionary, and revisionist, a danger to the region and the wider world; a power to be contained.²¹ The irrational behaviour label, favoured by some IR scholars and practitioners, does not assist understanding or serve as a helpful guide to policy. It legitimises punitive sanctions and weakens state capacity. The continued contestation of the Iranian state by outsiders has exacerbated regional tensions and invites further cycles of intervention.

Turning to the global politics of regionalism, MENA provides an interesting case which exposes the complex regional architectures of world politics. Rather than following models of integration or security community prescribed by IR scholars and EU practitioners, the region, like other areas, has performed according to a set of different criteria—at times adhering more closely to identity-based script (at the height of the Pan-Arab movement, for instance), at others to the simple exigencies of regional politics (as in the current Gulf Cooperation Council split). As with Asia, Africa, and Latin America, a sovereignty-first approach to regional cooperation is often favoured. Another key feature of MENA regionalism is the interdependence between regime security and regionalism, with the latter often reinforcing the former. Over time, the politics of identity appear to have loosened in favour of the construction of alliances for security purposes. Yet, MENA regionalism is not simply a study in failure. In revealing the deficits of rationalist approaches, it offers insights into more critical perspectives of regionalism and regional security.²²

Exploring such illustrative cases reinforces the call for a more regionally informed and locally sensitive approach to IR where areas speak for themselves. It challenges scholars to resist generalising theories and consider the region on its own terms, and on a level playing field with other world regions—this is the core message of global IR and one embedded in Chakrabarty's call to 'provincialise' Europe.²³

Conclusion

This contribution has explored one arena for the improvement of the IR-Area Studies dialogue by considering the MENA region as a highly

fruitful zone of exchange and one that can contribute to relearning IR and a better understanding of region. It is not the case, either historically or at present, that IR scholars and Middle East specialists have failed to connect. Indeed, the recent contributions of scholars to the symposium referred to above, offer ‘a portrait of a new type of a new IR theory emerging from Middle East studies and the specific experience of the Arab uprisings.’²⁴ Such contributions are timely and welcome. But few would disagree that 21st century IR needs to do better to respond to the still highly Western-centric approaches that continue to dominate the field and provide a distorted view of international reality. From the perspective of 2020, it is evident that events in the Middle East continue to present huge challenges for the regional and international order and yet remain poorly understood by scholars and policymakers alike. The IR of the region, like its politics, stubbornly resists generalisation. It is not enough simply to embrace and celebrate diversity by acknowledging the roles of the non-West. This belies a still unequal playing field. First, terms like non-West should be dropped; second, the roles and performances of all world regions need to be re-evaluated and incorporated into a more egalitarian and global IR narrative.

Notes

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2 Amitav Acharya, “Advancing Global IR,” *International Studies Review* 18 (2016): 4-15.

3 See Maiken Gelardi, “Moving Global IR Forward—A Road Map,” *International Studies Review* (2019). Available at: <https://doi.org/10.1093/isr/viz049>.

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19 Ewan Stein, "Beyond Arabism vs. sovereignty: relocating ideas in the international relations of the Middle East," *Review of International Studies* 38, no. 4 (2012): 881-905.

20 Ellen Lust and Ariel Ahram, "The Decline and Fall of the Arab State," *Survival* 58, no. 2 (2016): 7-34; Louise Fawcett, "States and Sovereignty in the Middle East. Myths and Realities," *International Affairs* 93, no.4 (2017): 789-807.

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22 Pinar Bilgin, *Regional Security in the Middle East* (New York: Routledge, 2019).

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24 Lynch and Ryan, "The Arab uprisings and IR theory," 645.

'I'LL TELL YOU SOMETHING ABOUT CHINA': THOUGHTS ON THE SPECIALIST STUDY OF THE INTERNATIONAL RELATIONS OF THE PEOPLE'S REPUBLIC OF CHINA

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I was a bloody mess. Literally. I had just been involved in an accident on the Chicago lakeshore and was in an ambulance to the hospital. The paramedic at my side was asking me questions, apparently trying to keep me awake. Finding out I worked on international relations, he asked me if I studied anything specific. I mentioned China. The questions stopped as I triggered a ferocious monologue. My slightly hazy recollection is that it began with the phrase, 'I'll tell you something about China...'

These days everyone seems to have an opinion on China. The field of international relations is certainly no outlier in this respect. The amount of work on the rise of China, U.S.-China relations, and China's place in the world has exploded.ⁱ This is to be expected. The People's Republic of China (PRC) is now the world's second largest economy in nominal GDP terms and also enjoys the dubious honour of having the world's second largest military budget. The number of countries for whom it is the largest trading partner exceeds that of the United States by a significant margin. And it has become a far more active presence internationally, be it in the United Nations, at Davos, or on the open ocean. China is now a hot topic for scholars of great power politics, international order, and the future of the international system more generally. The recent pandemic has only intensified this trend.

In what follows, I discuss the implications of this moment for specialists who study the international relations of the PRC. As I will outline, increasing popular interest and generalist engagement bring both many opportunities and frustrations. More crucially, however, specialist contributions are needed now more than ever to combat both simplistic, 'surface readings' of PRC behaviour as well as those that purport to read into its essence. Such contributions are not just correctives, but provide

i A Google Scholar search for the terms 'rise of China' + 'international relations' returns over two thousand English language results for 2019 alone. A Google Scholar search for the Chinese equivalent of those terms, '国际关系' + '中国崛起' returns nineteen hundred results for the same year.

the field a larger service, diversifying our understandings of state forms and behaviours without exoticising them.

To begin with, for those international relations scholars who have spent their careers focusing on the PRC, this is a bittersweet moment. On the one hand, increased prominence brings with it increased demand. Indeed, generally speaking, for scholars pursuing their careers in English-language institutions but whose regional focus is not the United States or Europe, it is frequently the case that they find their social capital rising and falling not with the quality of their scholarship but the perceived significance of their object of study.ⁱⁱ The said significance of any given state or region (the United States and Europe again excepted) in the English-language field is, in turn, often a reflection of the pre-occupations, anxieties, and fads of the North American and European international relations commentariat and elite. Where such attention is on the rise, so too are core job opportunities, possibilities for publication, student interest, and resources. When on the decline, core jobs and course offerings dwindle, and the respective regionally-focused scholars are reduced to trading observations and findings within insulated cliques. One might think increased calls for a more global IR have ameliorated this. The truth remains, however, that when not enjoying a moment of prominence, the detailed debates of regional experts attract about as much interest from IR generalists as would discussions between devoted philatelists concerning the attributes of a particular stamp.

But prominence also attracts interlopers, and those whose focus has long been the PRC now find themselves needing to respond to an ever-growing mass of claims and arguments forwarded by newly-interested generalists and pundits. There has been a massive proliferation of books, articles, and op-eds on the People's Republic of China, many of which seek to adjudicate the questions of whether or not China's rise will be peaceful and what China wants. Not a few are pulpy and breathless, rehearsing well-trodden memes and advancing essentialised claims. Acutely cringe-worthy are those that refer to the PRC as 'the dragon', repeat clichéd tropes about 'five thousand years of history', and make sweeping generalisations beginning with the phrase, 'The Chinese think...'

ii In what follows, I focus on the experiences of scholars of the international relations of the PRC within English-language academic institutions. This author's location — the University of Oxford — finds itself at the intersection of European and North American approaches to international relations, and disciplinary incentives both inside the institution and within the United Kingdom more broadly privilege the ability to show relevance to the broader English-speaking field. Needless to say, the opportunities, obstacles, and changes recent developments have entailed for those who study the international relations of the PRC within the PRC, or, alternately, in countries such as Japan or South Korea, involve a whole different set of dynamics that are topics in their own right.

Certainly, not all such work is so awful, and the dismissive responses of some PRC specialists towards their generalist colleagues may admittedly contain a tad bit of territorial defensiveness and resentment. Studying the international relations of the PRC in depth is not easy. It often requires engaging with mountains of mind-numbing official-speak; navigating the numerous obstacles the PRC erects for access to documents, people, and facts; and living with the constant awareness that when you attempt to stare into the abyss of the party state, it very likely is staring back.¹ For many it also means surmounting the hurdles of language acquisition, and attaining specialist fluency in both Chinese and English is no easy task.ⁱⁱⁱ The glib newcomers whose arguments rely on official GDP statistics, secondary English-language articles, and conversations at an invited conference or two in China thus may appear not to have fully paid the price of admission. They have not spent the time pouring over documents and sources, they have not sought to amass and parse partial and fragmented evidence of the actual workings of foreign policy within the PRC, they do not have to worry about risks to themselves or those with whom they interact, they have not even had to deal with the frustrations of being punished by word-limits for using Chinese-language source material (the titles have to be provided in the original and in translation). It jars a bit then, when the new-comers start taking up prime real estate in top journals and basking in citations.

So what are the possible responses? One is simply to continue to cede the territory of the top English-language journals and remain focused on the nuanced questions. This entails writing detailed, close examinations of certain elements, episodes, and developments within PRC foreign policy making and behaviour with the foreknowledge these will likely be confined to more regionally focused journals or specialist publications that generally are lower-ranked in the field. Another is to attempt to reframe one's work to speak to the wider questions as they are being defined in the so-called 'mainstream literature,' and by this I mean the extremely competitive territory of a select number of journals that rank highly in terms of citation counts and esteem within English-language political science departments.² To do so, however, one must often sacrifice some of the nuance, attention to specialist debates, and hard-won minutiae that is of little interest to the latter's target reader readership.

Both have their pros and cons, and in some rare cases, there are scholars that manage to bridge the two. But there is a further form

iii As one insightful reviewer noted, this also touches upon issues of 'language and knowledge production in IR' and an entire book could be written on this topic as pertains to the PRC. Importantly, while work written by Chinese scholars in English may be engaged as part of the disciplinary conversation, work published in Chinese is often treated not as scholarship itself but as an object of study for insights into the PRC.

of engagement that is needed. As their subject matter assumes an ever-larger role in an English-language field that has traditionally taken North American and European experiences and contexts as the normalised point of departure for understanding the world, the expertise of those who have spent their careers studying the international relations of the PRC is necessary now more than ever as an antidote to two frequent problems appearing in writings on China: surface reading and essence reading.

First: the problem of surface reading. There are many things which, when taken at face value, may appear to be homologous across contexts. These include the roles of certain actors or institutions, the manner in which decisions are made, the significance of certain policy choices or processes, statistical outputs, and so forth. But appearances can be deceiving. For one, there may be actors, power relations, informal or submerged processes, internal battles and so on that may not be evident at first or even second glance, and yet crucial for understanding what is occurring. This is particularly true for the PRC. There is a complex set of interactions between the party and the state, across domestic political interest groups and constituents, and within intra-party struggles, the details of which are often far from clear at the time. Sometimes these pierce the surface, as was the case with the dramatic fall of Chongqing party boss Bo Xilai in 2013.³ But even then, the particulars of such incidents remain sketchy and will likely remain so for the foreseeable future; to wit, there still remains disagreement over the details of much better known party struggles almost half a century old, such as the death of alleged coup-plotter Lin Biao.⁴

What is more, the meaning and significance of certain gestures, statements, policies, data and the like may vary widely by context; absent an understanding of this context one may seriously misread what is occurring. There is a clear hierarchy of actors in the PRC system — one not necessarily corresponding to other states — and the authoritativeness of their statements vary widely. The PRC Foreign Minister, for instance, holds a relative low-ranking position in the foreign policy making establishment. And a commentary by Hu Xijin at the *Global Times*, for example, has a much different value from something written by Zhong Sheng at the *People's Daily*, even if both are ostensibly under the supervision of the Chinese Communist Party (CCP).^{iv}

iv Hu Xijin, the editor of the *Global Times*, is a firebrand known as someone who both pushes borders and at times releases insights into the thinking of portions of the CCP elite, but he and his paper are also dismissed by many within China. At times, he has been accused of being overly provocative in an effort to elicit foreign attention and advertising revenue. In contrast, Zhong Sheng is not a person but rather a homophonic pseudonym for the 'voice of the centre', and thus represents more authoritative statements of CCP policy. See: Samuel Wade, "How Seriously Should You Take *Global Times*," *China Digital Times*,

On top of this, the informants, sources, and data one uses may also be seriously biased in ways that are not immediately obvious to those coming from outside that context. The combination of censorship and incentives to misrepresent (such as for cadres to over-report their accomplishments) in the PRC system exacerbate this to an extreme. It has long been the case, for instance, that PRC provincial economic growth data has added up to more than the national total.^v To be clear, this is more than just an entrety for nuance. It is rather the observation that contextual variation may be significant and massive and yet obscured by seemingly familiar surface appearances.

Second: the problem of reading into an essence. We need to avoid essentialising or exoticising difference, playing into 'you just cannot understand' self-orientalising exceptionalism, or reifying variation within static and nation-state-shaped bubbles of purported cultural otherness.^{vi} Mine is a plea for context not culture. Even the most of alien-seeming manifestations of difference from the perspective of outsiders have their own logics; these logics are intelligible when given context. Power, legitimation, status, bureaucratic or parochial interests, self-justificatory myths, human fallibility and frailty, and historically-ingrained practices — these are factors and dynamics not unique to any polity, and indeed ubiquitous to the phenomena we study in international relations. The PRC and, more specifically, the CCP seek with few exceptions to maintain party discipline and an outward appearance of super-human unity and rationality. But this is not the same as being a unitary actor, and discipline is a never-ending battle.⁵ The PRC is a huge state, with all variety of domestic, bureaucratic, regional, and factional pressures, dynamics, and disunities.^{vii} With more than a billion

August 3, 2016, accessed February 10, 2020, <https://chinadigitaltimes.net/2016/08/seriously-take-global-times/> and Samuel Wade, "Who Does the Global Times Speak For?" *China Digital Times*, August 11, 2016, accessed February 10, 2020, <https://chinadigitaltimes.net/2016/08/global-times-speak/>; on Zhong Sheng and other pseudonyms within the PRC system, see: Michael D. Swaine, "Chinese Leadership and Elite Responses to the Us Pacific Pivot," *China Leadership Monitor* 38, no. 5 (2012): 1-2, fn.2-4.

v For an excellent introduction to the problems of data in the PRC, see James Palmer, "Nobody Knows Anything About China," *Foreign Policy*, March 21, 2018, accessed February 10, 2020, <https://foreignpolicy.com/2018/03/21/nobody-knows-anything-about-china/>

vi In the context of the PRC, William Callahan refers to such a discourse as 'Sino-speak'. See: William A. Callahan, "Sino-Speak: Chinese Exceptionalism and the Politics of History," *The Journal of Asian Studies* 71, no. 1 (2012).

vii To cite just one example, see Min Ye's excellent work on the Belt and Road Initiative in China: Min Ye, "Fragmentation and Mobilization: Domestic Politics of the Belt and Road in China," *Journal of Contemporary China* 28, no. 119 (2019).

people how could this not be the case? These phenomena are, of course, shaped by institutional incentives, historical path dependencies, and shifting developments. They all have their own logics, and those logics are comprehensible even if not immediately perceptible or legible. And to be crystal clear, presenting a logic as comprehensible, however, in no way means that it constitutes a morally acceptable rationale. (Unfortunately, failure to recognise this distinction too frequently results in specialists being tarred as apologists.)

Compounding the problem of essentialist readings, the CCP elite sees itself in a constant struggle to perpetuate its predominance, and in doing so has itself embraced a variety of stark, essentialised characterisations of Western versus Chinese cultural difference. Othering conflicting viewpoints as foreign is a crude tactic of delegitimation by no means limited to the PRC, even if the CCP lays it on particularly heavily. In reality, the PRC is host to a myriad variety of different forms of political thought and reasoning, ranging from liberals to nostalgic Maoists.⁶ Just because the internal debates, disagreements, and divergences are not always overtly visible, that does not mean they are not occurring, and specialists are often best placed to bring these to light.

To conclude, among area-focused international relations scholars writing for English-language audiences, those who work on the PRC may count themselves lucky as the so-called wider field has taken an interest in their object of study. But they are also finding themselves contending with ever-more 'I'll tell you something about China...' generalist commentary claiming to explain PRC behaviour. In this context, said specialists can (1) offer a means of interpreting and reading that highlights the potential expanse of variation within political organisation and behaviour, meaning-making practices, and perspectives that exists inside the PRC; (2) provide potential explanations that supply a demystifying, de-essentialising intelligibility to the logics in operation within PRC rhetoric and practices; and (3) point out the limits of our ability to make definitive claims based upon available evidence.

The above may not seem at first sight to be contributions to the wider field of general English-language international relations theorising. But they are. Generalists and pundits frequently employ language that reduces the PRC to familiar categories such as 'rising power', 'authoritarian' or 'revisionist' that, while not necessarily inaccurate, can simplify or essentialise in unhelpful ways. If a little knowledge can be dangerous, broad generalisations that stem from it can be even more so. The work of PRC specialists can challenge the field to refine its categories and assumptions to better reflect a more complex picture, while also encouraging greater humility and restraint where that picture remains unclear.

- 1 Isabella Steger, "A New Study Shows The Growing Perils For Academics Researching China," *Quartz*, 5 September 2018, accessed February 10, 2020, <https://qz.com/1379245/study-of-academic-freedom-in-china-shows-perils-for-researchers/>
- 2 For the journals, see: Brian J. Phillips, "Ranking IR Journals," January 7, 2014, accessed February 10, 2020, <https://duckofminerva.com/2014/01/ranking-ir-journals.html>
- 3 For a fascinating rendition of this, see: Carrie Gracie, "Murder in the Lucky Holiday Hotel," BBC, March 17, 2017, accessed February 10, 2020, https://www.bbc.co.uk/news/resources/idt-sh/Murder_lucky_hotel
- 4 "45 Years Later, Lin Biao's Mysterious Death Continues to Haunt Party Leadership," *Shanghaiist*, May 5, 2018, accessed February 10, 2020, https://shanghaiist.com/2016/09/13/lin_biao_death_anniversary
- 5 "China Focus: CPC further enhances Party discipline," *Xinhua*, August 28, 2018, accessed February 10, 2020, http://www.xinhuanet.com/english/2018-08/28/c_137424747.htm
- 6 See: William A. Callahan, *China Dreams: 20 Visions of the Future* (Oxford University Press, 2013); David L. Shambaugh, *China Goes Global: The Partial Power* (Oxford University Press Oxford, 2013), 13-44.

WHY INTERNATIONAL RELATIONS AND AREA STUDIES NEED EACH OTHER

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The place of Area Studies in academia has been the subject of recurrent debate. One round took place in the 1960s as the focus of the Cold War shifted to the Third World; another occurred in the 1990s with many Western academics making strident claims about the universality and universal applicability of Western social science. The ensuing arguments were often intense, sometimes ill-tempered, and ranged across many disciplines. More recently, there has been a very welcome increase in cross-regional comparative research and the methodological problems involved. By contrast, the links between Area Studies and International Relations (IR) have been relatively understudied. In this short article, I will focus on, first, what is specific to International Relations and, second, on some of the reasons why IR and Area Studies need each other.

The development of Western academic International Relations was often deeply hostile to Area Studies. The core goal, after all, was to understand the international system as a whole. This was true of classical realists such as Hans Morgenthau, and it was true of Hedley Bull and writers on international society. IR was seen as an integrating and synthesising field of enquiry. It analysed how things hang together, and it was driven by central perennial questions—above all, of patterns of war and peace, and of order and disorder at the level of the system as a whole.

Second, and closely related, International Relations is naturally the domain of the strong and the powerful, and, as Kenneth Waltz and so many others argued, theory building needed to reflect this. Realists concentrated on the balance of power and on conflicts amongst the great powers. Others (including many historical sociologists) stressed the extent to which major power relations are also fundamental to understanding the evolution of capitalist globalisation and the changing character of transnational social relations. But the core message was clear: IR was, and would remain, about major states and the rise and fall of great powers.

Third, traditional Western International Relations ignored Area Studies because of a particular view of the globalisation of international society. The core image is of a European international society that had

i I would like to thank the three anonymous reviewers for their very helpful comments.

Andrew Hurrell, "Why International Relations and Area Studies Need Each Other," *St Antony's International Review* 16 no. 1 (2020): 191-196.

developed its own set of institutions and that then became the core of a historically unprecedented global order. For the first time in human history, there is a single global political order. Both the logics of geopolitical competition but also the institutions of (Western) international law and society have come to be reproduced on a now global stage. From this perspective, there is no outside and few alternatives. Instead, there is one unavoidable, if heavily contested, language of international order and of global political life.

But this neglect has come at a very high cost. Without a sensitivity to Area Studies, academic International Relations cannot deliver on its promise to provide a satisfactory historical account of how global international society evolved, nor an adequate analytical account of its dynamics, nor a plausible normative account of how it might be reformed or re-structured. Why not? There are four reasons.

In the first place, even on its own terms, the 'top-down systemic account' is profoundly misleading. What happens on the ground matters as much to the big picture as balances of power between major states—think of decolonisation, the failures of the superpowers in Afghanistan and Vietnam, or the extent to which the US, with all its military might at the height of the supposed 'unipolar moment', suffered successive defeats in Afghanistan, Iraq, Libya, and Syria. In addition, the international order is not just about clashes of power and shifting prudential calculations of interest amongst the strong; it has to involve the analysis of weaker states and societies, their understanding of fairness and justice, their concerns for status and recognition, and the ways in which their conceptions of international order have varied across time and space.

Second, a major trend in the study of International Relations over the past thirty years has been to unpack and debate the importance of the regional. From the early 1990s, work on the 'new regionalism' and on the international relations of particular regions of the world grew apace. This is a rich field of enquiry. Here, I would simply emphasise that once one opens up the need to understand regional international societies in their own terms, then all of the claims of Area Studies come directly into play—above all, the fundamental role of context in discerning the meanings that actors ascribe to their actions, and the complexity and inter-relatedness of politics, history, and culture.

Third, there are the powerful critiques of eurocentrism—from post-colonialism, from critical IR, and from global history. The central arguments are well known: (a) to underscore the importance of positionality: Whose history? Seen from where? Written by whom?; (b) to demonstrate that neither time nor geography are ever politically innocent and that there is a constant need to understand the historical construction of notions of time and history, and of space and globality— notions without which modern Western understandings of global order and of international relations would make very little sense; (c) on the other side,

to give far fuller accounts of the agency of those previously condemned to sit in what Chakrabarty called the 'waiting room of history'; and (d) to revise and critique Eurocentric accounts of how international society became global and of the normative changes involved in that process. The way in which this story is now told has been extensively revised.

And fourth and finally, there are the ways in which the global itself has been changing. The focus on the post-Cold War period and on the apparent naturalness of a Western-dominated, self-described 'liberal' order has led to a foreshortening of history. The global is undergoing dramatic changes. The COVID-19 pandemic illustrates the threat to human societies caused by the deep and structural interconnections between an unequal and unstable global economy, an ecological system characterised by immense complexity and poorly understood tipping points and feedback loops, and a global political order in which global governance institutions are weak and have to live alongside the return of geopolitics and power-political competition between the major states of the system. But we can only make sense of these changes by placing contemporary debates within a longer-term historical perspective and a far more strongly global perspective.

The danger, however, is that the search for 'non-Western' ideas and for regional and cultural 'perspectives' on global order has its own limits. Uncovering the culturally specific character of different ways of understanding the world undoubtedly encourages greater pluralism and reflexivity. But it can also lead to a cultural and regional inwardness that works to reproduce the very ethnocentricities that are being challenged. The search to understand what is distinctive and different has involved a retreat from the global—or at least thin and one-dimensional characterisations of the dynamics, forces, and logics at work at the global level. Given the very power of the global, there are no longer (if there ever were) any non-Western country, regional, or cultural perspectives that can be gathered together in any straightforward or unproblematic manner. The sheer power of the global means that attempts to identify a 'Chinese' or an 'Indian' perspective on global order will face severe methodological difficulties.

So the question remains: how do we give due weight to the power of the changing global whilst building on the importance of regional and area knowledge? We—all of those engaged in different locations, trying to make sense of the modern global and international—certainly need to pluralise, to relativise, and to historicise. And, for all of the reasons given above, we need to recognise the continued power of Chakrabarty's claim that Western analytical and theoretical categories remain indispensable but inadequate. We cannot escape from the disciplinary and theoretical Western mainstream, but dominant concepts and ideas never travel unproblematically. And we need work that de-centres other regional or cultural perspectives and that problematises unreflective 'non-Western'

The option of not confronting what is happening at the global level out of a suspicion of grand narratives and big historiographical stories, or a culturalist dislike of thinking about material structures, is not sufficient. In some cases, perhaps most plausibly China, understanding Chinese engagement with the global may well involve a questioning or re-casting of the fundamental social categories of Western social thought—state, market, and civil society. In other cases, we need to be constantly alert to what Cardoso once labelled the ‘originality of the copy’.

Few are likely to dispute the proposition that contemporary international relations are being re-shaped by the revival of geopolitical rivalries. But this does not mean a return to a crude realism built around an essentialised ‘international’. To understand power, nationalism, and geopolitics, we need to develop a far more social view of the system. Exceptionalism and nationalism, for all of their particularist claims, are the product of systemic forces and dynamics and need to be compared and connected. The crucial point is surely that stressed by Rogers Smith: as students of politics, we must be especially attentive to the politics of identity: explicitly politicising identity claims, de-naturalising identity claims, and historicising identity claims. We constantly need to be suspicious of culturalist accounts—not because culture does not matter, but because it is with the politics of culture that we need to be most concerned.

A second important goal is to develop concepts and conceptual frameworks out of varied regions and contexts, but to seek their more general application and relevance. Comparison reigns methodologically supreme, and we spend much less time thinking about connectivity and about how comparison and connectivity relate to each other. Even if the language is shared, the real meaning may be very different. As other contributors in this issue note, rather than concentrate on the ‘radically different’, it is the ‘nearly the same’ that is often of greater importance in the analysis of non-Western International Relations. Iain Johnston makes the crucial point that Area Studies is not about the exotic and the esoteric; it is part of how we can do good social science.

A third important issue concerns normative theory and the global study of political ideas. The normative analysis of global order has been the most Western-centric of all. Cosmopolitan liberal global governance, for example, was about achieving justice for individuals; it was about what ‘we’ in the rich world owed distant strangers. Very little of this work made reference to the self-understandings of the ‘objects’ of justice in the non-Western world. One part of the challenge is political: listening and noting the views and values that are expressed and argued in all parts of the world and by the most marginalised voices. Another part of the problem is methodological. The study of Western political theory has advanced significantly in methodological terms: contextualism,

conceptual history, reception theory, theories of ideology, etc. For all the increased interest in how IR is studied in different parts of the world, the study of global political theory remains in its infancy.

International Relations has a strong claim to be 'the' academic field where there is the richest tradition of analysing how the global evolved historically, how different systemic and global factors and forces interact (especially global capitalism and the distribution of inter-state power), and how the political and normative constructions of global order can best be understood and debated. It is in this sense that Fred Halliday suggested that International Relations is the capstone discipline of the social sciences. Yet it is also a field which can suffer most from the flight from reality and especially, the flight from a sense of reality grounded in regional or area-specific knowledge and understanding. It is therefore on this basis that International Relations and Area Studies need each other. At the same time, the quest for a global IR will remain a domain of contestation. It is a mistake to think that there is an easy solution, or indeed any stable endpoint in an ever-changing global system. Rather, there needs to be a shared willingness to engage critically and constructively in the debates about what the global study of International Relations is all about and how it might best be taught, researched, and organised. This will need to involve ongoing critical reflection (including of the subject's colonial and imperial connections); the participation of an increasing plurality of voices; and the engagement with insights and cases from outside of the West. But it will also entail finding new ways to move 'beyond critique', especially in terms of combining theoretical and conceptual innovation with the highest quality historical and area-grounded empirical knowledge.

Notes

1 For a rich account of the Cold War period, see Benedict Anderson, *A Life Beyond Boundaries* (London: Verso, 2016). For a flavour of the post-Cold War controversies, see Ian Lustick, Contribution to "Controversy in the Discipline: Area Studies and Comparative Politics," *PS: Political Science* 30, no. 2 (1997): 166-179.

2 See, in particular, Ariel Ahram, Patrick Köllner, and Rudra Sil, eds., *Comparative Area Studies: Methodological Rationales and Cross-Regional Applications* (Oxford: Oxford University Press, 2017).

3 Dipesh Chakrabarty, *Provincializing Europe: Postcolonial Thought and Historical Difference* (Princeton: Princeton University Press, 2000).

4 Andrew Hurrell, "Cardoso and the World," in *Democracia, crise e reforma: Estudos sobre a era Fernando Henrique Cardoso* eds. Herminio Martins and Maria Angela D'Incao. (São Paulo: Editora Paz e Terra, 2010): 473-499.

5 Rogers M. Smith, "Identities, Interests and the Future of Political Science," *Perspectives on Politics* 2, no. 2 (2004): 301-312.

6 See also Pinar Bilgin, "Thinking past 'Western' IR?," *Third World Quarterly*, 29, 1 (2008): 5-23.

7 Alastair Iain Johnston, "What (if anything) does East Asia tell us about International Relations Theory?" *Annual Review of Political Science* 15 (2012): 53-78.

8 For a recent overview of perspectives see Leigh Jenco, Murad Idris, and Megan C Thomas, eds., *The Oxford Handbook of Comparative Political Theory* (Oxford: OUP, 2019).

9 Fred Halliday, "International Relations in a Post-hegemonic Age," Text of valedictory lecture, LSE 30th January 2008, available at http://www.lse.ac.uk/assets/richmedia/channels/publicLecturesAndEvents/transcripts/20080130_FredHalliday_tr.pdf

10 Amitav Acharya, "Advancing Global IR: Challenges, Contentions and Contributions," *International Studies Review* 18, no. 1 (2016): 4-15.

BRINGING EUROPE BACK IN: GLOBAL IR, AREA STUDIES AND THE DECENTRING AGENDA

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Europe@Ox: Unfinished business

When I arrived in Oxford in the late 1990s to teach International Relations and European studies, coming from North America where the idea of studying specific regions of the world in multi-disciplinary academic clusters was slowly but surely withering away, I was thrilled to discover this University's unique commitment to Area Studies. To be sure, if IR developed as the 'American Social Science', European contributions to the field have tended to be more pluralistic. But even in the British context, Oxford seemed relatively unique, starting with the kind of multi-disciplinary mindset encouraged by the collegiate system. Perhaps most importantly, and certainly ironically, the University's historic role in supporting Great Britain's colonial project had laid the foundation for its continued engagement with the global south and its regions. From my IR standpoint, I could only bank on the hope that Oxford's partaking in the 'civilising mission' of yesteryear had given way to a true scholarly commitment to mutual recognition.¹

But to my surprise, one piece of this puzzle was missing: in Oxford, Europe (along with the United States) did not seem to count as a 'region' or an 'area' to be taught alongside others under the broad umbrella of Area Studies. Instead it figured safely at the heart of humanities and social science disciplines, as the core material for teaching history, politics or international relations. This state of affairs is common in European universities, as well as in the US, where in any case all area studies have been radically culled in favour of narrow disciplinary anchoring.

In the twenty intervening years in Oxford, some things have stayed the same and some things have changed. Area Studies has grown and consolidated as the Oxford School of Global and Area Studies, the

i In addition to the insightful STAIR review and the Oxford colleagues who have contributed to this special issue, this article has benefitted from my work with many collaborators under the Rethinking Europe in a Non-European World (RENEW) programme (2005-2020), including doctoral students Nora Fisher Onar, Tobias Lenz, Gabi Maas, Gjovalin Macaj, Sizwe Mpofu-Walsh, Claire Vergerio, and Juri Viehoff.

Kalypso Nicolaidis, "Bringing Europe Back In: Global IR, Area Studies and the Decentring Agenda," *St Antony's International Review* 16 no. 1 (2020): 197-206.

largest community of Area Studies scholars anywhere in the world. But in spite of efforts on the part of many of us, Europe and the EU remain outside Area Studies (except as part of Russian and East European studies). In the meanwhile, we have deepened our commitment to teaching and research under the broad umbrella of 'global IR', an agenda encapsulated in Amitav Acharya's keynote lecture at ISA in 2014.² In a nutshell, this commitment is both epistemological and ontological. Epistemologically, as a scholar committed to global IR, I apprehend my field as an interdisciplinary space where explorations of the global meet from a multiplicity of disciplinary perspectives from game theory to international law, global history,³ global sociology,⁴ or political theory. Area Studies represents geographically-bound spaces for the multilogical exploration of these knowledge boundaries. IR's global reach is predicated on taking in these areas not only as resources or 'cases' but as sources or 'voices'.⁵ Ontologically, global IR is grounded on an understanding of the world through the lens of diversity and interconnection, amenable to comparisons across space and time, be it as a world of regions,⁶ or as a multiplicity of systems, from empires to federations, leagues of city states, or state systems, vying for survival or pre-eminence across historical eras.

In this perspective, the relationship between global IR and Area Studies can be seen as a subset of the need for more general critical engagement between the Social Sciences and Area Studies, which Börzel and Zürn for instance have labelled 'double reflexivity', e.g. the need, on the one hand 'for generalizing social scientists to consider the impossibility of analysing global processes with impartiality because their own perspectives are always contextualized', and on the other hand 'for localizing area studies to acknowledge methods and mechanisms that allow moving towards generalization'.⁷ I would go further and argue that from an IR perspective, such mutual engagement requires not only self-reflexivity (acknowledging that one always speaks from somewhere) but radical decentring and 'reversing the gaze' (acknowledging the centrality of those speaking from elsewhere, wherever your 'elsewhere' happens to be). In other words, it needs be not only synergistic but symbiotic, one of mutual constitution, epistemologically and ontologically, where Area Studies does not only play the role of contextualising side-kick to IR generalisers but is itself the locus of emergence of generalising approaches to the socio-political.⁸ Needless to say that such an understanding of mutual constitution is best thought of as a branch of critical theory, which is where I situate my work.⁹ Some would call it analytical 'tough love'.

To be sure, this is a game of infinite mirrors, as one decentres to other loci of knowledge which might in turn one day themselves become self-centric and hegemonic. Indeed, be it a national or a regional mantra, there is nothing less exceptional than exceptionalism claims – whether

we treat exceptionalism as an ontological statement in the Area Studies debate (are the defining features of particular regions so unique to be usefully compared or generalised?) or as a politicised narrative grounded on what I would call *nationalist* regionalism.¹⁰ Indeed, the risk in global IR is to reify non-Western loci of authority, and to forget to decentre *within*. Nevertheless, Euro-exceptionalism talk is exceptional to the extent that it structures the distribution of epistemic as well as material power in the international system. (I am not to expand here on the necessary comparison with US-exceptionalism.)

I consider it more urgent than ever, therefore, to bring Europe back to the embracing fold of Area Studies, in Oxford, for sure, but also beyond in the epistemologies of power. And in doing so to use European studies to better serve the global IR agenda. Why should Europe (or the United States) be the core referent if you study, say, constitutionalism? Why can't you reverse the gaze and start with the transformative constitutionalisms of South Africa or India and ask what these experiences tell us about European constitutionalism?¹¹ This premise inspired the launch of Oxford's RENEW programme (Rethinking Europe in a Non-European World) in 2005 at a time when our emergence from post-Cold War complacency combined with the fall-out from the Iraq war inspired EU scholars to travel 'out there' and ask 'how do they see us?' In contrast, RENEW's ambition was based on the simple diagnosis that we live in an increasingly post-Western world, and certainly in a non-European world, and that it was worth revisiting the old critique of Eurocentrism, ultimately from a policy-oriented perspective. Our mindset was informed by a broader commitment to reconsider the sources and expressions of our flawed and multiple modernities, a despondency in equating the West, or anywhere else for that matter, with progress, and a commitment to listening to the voice of the less powerful, the subaltern, from within and from without.¹² I turn here to three strands of a broader agenda.

Europe's Colonial DNA, standards of civilisation and the post-imperial

One first strand of RENEW had to do with exploring the double meaning of Europe's 'post-imperial' condition in a *longue durée* historical and comparative perspective, including through a seven-year-long collaborative project between historians and political scientists at Oxford resulting in *Echoes of Empire*.¹³ On one hand, and empirically, *post* refers to post as reproduction, or the idea that the EU's relations with the rest of the world cannot be understood short of engaging with the colonial inheritances of its member states, whether as colonising or colonised states. As we move from national to transnational and multi-site entangled memory, we also need to acknowledge the blind spots of our European memory, where more often than not the referent 'Europe as a community of memory' refers to Europe's global civil war of 1939-

45, rather than the wars it inflicted onto the rest of the world decades and centuries earlier. Hence the need to deconstruct the myth of the EU's virgin birth and its politics of denial since 1958 when assessing its foreign policy, especially in Africa.¹⁴ On the other hand, and normatively, *post* refers to post as transformation, the normative horizon of truly overcoming this colonial past through self-reflexivity and engagement with the historical legacies that colour the gaze of others. Indeed, what is the point in exploring the darker side of western modernity, if not to overcome its ongoing and entrenched consequences today?¹⁵ Ultimately, our aim was also prescriptive, e.g. to ask what a post-colonial approach to EU external relations might look like.

To be sure, we adopted a social scientific approach to exploring historical legacy, rejecting blanket statements about neocolonialism, asking instead when and under what conditions would we recognise these legacies when we see them. Indeed, while imperial ideologies underwent profound change in the course of the 19th and 20th century, we continue to be confronted with similar questions raised by the relationship between liberalism and imperialism.¹⁶ Nevertheless, while some denounce the legacies of colonialism they discern in the EU's practices and discourse, others believe these accusations to be unfounded, thus raising the question: how apt is the analogy between the 19th-century standard of civilisation and the EU's narratives and modes of actions today? In response, we developed a 'new standards typology' articulated around two axes: agency denial and systemic hierarchy, referring respectively to the unilateral shaping of standards applicable to others, and to the salience of Eurocentrism in the way the standards are enforced and structure the international system.¹⁷ And we argued that in transforming their 'continent' from a metropolis to a *microcosm* – from a cluster of colonial capitals to an EU that contains many of the world's tensions within itself – Europeans have only partially succeeded in transcending their colonial impulses. If the EU suffers today from geopolitical solitude it may also look for a way out in its ability to become a post-colonial power which calls for those acting in its name to reflect upon the 'standards' that inspire their action.

The Decentring Agenda

A second strand to our research programme has been to spell out in greater detail – from the standpoint of European Studies – the more general 'decentring agenda' called for by global IR.¹⁸ Critically, such a decentring approach is both epistemological and prescriptive, targeting the motives and forms of the EU's external relations. It starts with operationalizing Chakrabarty's call for 'provincializing' Europe, e.g. questioning Eurocentric accounts of world history and politics;¹⁹ moves on to 'engaging' other perspectives in which Europe may or may not figure;

and then aims at ‘reconstructing’ an EU approach to the rest of the world that recognises delegitimising patterns. To be sure, we sought to assuage concerns that such a decentring agenda may only end up empowering other power centres in the world and their own hegemonic, and at times violent, practices, by stressing our goal to eschew neocolonial habits which demand from others full convergence with European practices without giving up the EU’s cutting-edge project of empowerment via democratisation, rule of law, and support for the rights of the vulnerable. One central area of concern is Europe’s so-called neighbourhood where the transformative potential that comes with engagement with the EU has been considerably dampened by its propensity to reproduce old patterns of sphere of influence, and to support regime stability over democratisation.²⁰

As a result, and although it does privilege an examination of inter-state relations, the decentring agenda is attuned to the risk of ‘methodological nationalism’ on two counts. First, it is fair to say that beyond decentring to other national viewpoints, we are ultimately committed to what we have labelled ‘double decentring’, namely a commitment to opening the black box of other states and engaging with the viewpoints of groups and individuals within, whether that of LGBT communities,²¹ gendered perspectives through the lens of decolonial feminism,²² or citizens’ agendas in conflict prevention.²³

Second, ultimately, external decentring calls for internal decentring. Much of what we are after has to do with patterns of social relations within European countries themselves. In this sense, it is right to question the ways in which famous social theorists – Habermas and Beck, for instance, call for both the re-affirmation of cosmopolitanism as a central feature of the European project while eschewing what they refer to as multiculturalism – or beyond labels, the empowerment of internal ‘others’, whose scapegoating is one aspect of the populist threat to the very European integration they seek to save from itself.²⁴ As Gurinder Bhambra has argued, ignoring the colonial histories of Europe enables the dismissal of its multicultural present and thus unwittingly reproduces features of the populist political debates they otherwise seek to transcend. Against an EU story which renders invisible the long-standing histories that connect those migrants with Europe, decentring must start from within. The danger is a form of neocolonial cosmopolitanism that legitimises policies of domination both within and outside Europe.

A Critique of ‘EU-as-Model Talk’

A third strand of our research critically appraised the idea, both descriptively and normatively, that the EU system can and should serve as a model for governance beyond its own borders for other national,

regional, or global spheres of governance. In doing so, we partake in a broader critical theory approach to the EU, targeting both dominant political and academic discourse.²⁵ We argue for a problematisation of the label 'model' without denying the value added by EU governance for the rest of the world. We start by developing an analytical heuristic that builds on three semantic meanings of the term 'model' and outline the challenges of interpretation and translation that are associated with each: a) a representation of something meant to support its reproduction (architecture, engineering); b) an object of aspiration, worthy of imitation (psychology and role models); c) that which serves as an inspiration and the object of re-interpretation (figurative art for instance). Here again we advocate for greater reflexivity on the part of Europeans, that is, to systematically question assumptions behind their model discourse and practice. And we argue that if the cosmopolitan promise is to be retrieved from the radical critique of Eurocentrism, Europeans need to infuse the EU's message and practice with an ethos of mutual recognition as a crucial feature of a post-colonial agenda for the EU's role in the world.

It is worth noting that the recent poly-crisis that has bedevilled the EU makes it harder than ever to ignore the intimate link between internal and external critique. Doesn't the 'migration crisis', exploited by right-wing populist parties in many EU countries to trigger anti-EU sentiments find its roots in part in the EU's Middle East policy and its trade policy with Africa?²⁶ If the EU's poly-crisis and Great Britain's bailing out altogether from the club have undoubtedly affected the EU's image beyond its borders, how should it change the way it 'exports' its standards? Is it possible to speak of the EU as a model without invoking its quality as an experiment, which fails as often as it succeeds? If the EU is to claim anew some leadership in reforming global governance in the wake of the COVID-19 pandemic, from the WTO to the WHO or the Bretton Woods institutions, it must pursue this global debate on governance with humility and self-awareness.

Conclusion

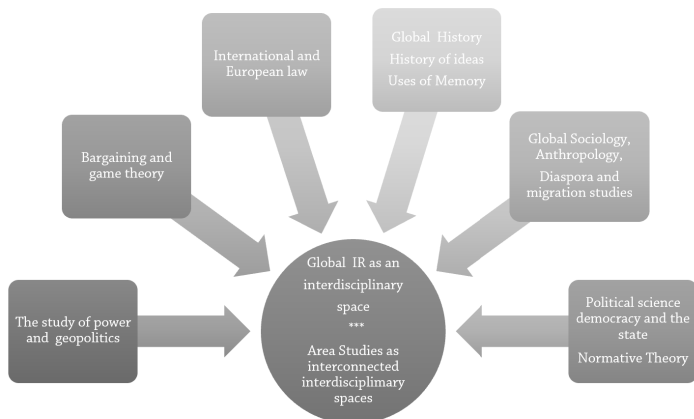
Many of us have chosen to 'do IR' for its emancipatory potential. But if history has taught us anything, it is that it would be foolish to believe that moral progress can happen simply as a result of polite conversations in our classroom without being backed up by living and breathing democratic contestation and social struggle.

I started this short overview of Area Studies, and the place of Europe within it, by reflecting on my time in Oxford. It might be apposite to conclude, therefore, by coming back to our own grounds. In 2015, and again in 2020, students at Oxford demanded the removal of a statue of Cecil Rhodes which adorns Oriel College and overlooks passers-by on Oxford's High Street. In doing so, they followed in the footsteps

of University of Cape Town students who had successfully expelled the 19th century imperialist business magnate from their campus under the battle cry ‘Rhodes Must Fall’, thus sparking an international movement calling for the decolonisation of universities across the world. ‘Destruction’, the accusation which their critics enjoyed making, was not the point. Instead, this agenda is about the ‘re-construction’ of our shared social space, starting with the places, our University, where knowledge is created and appropriated according to entrenched patterns of power distribution which must be disrupted for progress to happen. Since then, and alongside more than a hundred Oxford colleagues, students and staff, I have been involved in multifaceted efforts for our University to acknowledge, further explore and remedy its own colonial legacies, to address the ways they reverberate today in its physical and mental environment, its curricula, hiring or admissions practices.²⁷ As this special issue goes to press in the summer of 2020, we are regaining momentum as part of the global protests led by *Black Lives Matter*. The hope is for radical pedagogical, disciplinary and institutional change, not only in Oxford, but around Europe, to encourage the next generation to learn more about the present of their colonial and imperial past.²⁸ For if a university like ours, at the very heart of the former coloniser’s space, fails to engage in decolonial work, what hope is there for our society at large?

Annex

Figure 1: Global IR and Area Studies as Interdisciplinary Spaces



- 1 Laurence W. B. Brockliss, *The University of Oxford: A History* (Oxford: Oxford University Press, 2016).
- 2 See Andrew Hurrell in this volume. See also: Amitav Acharya, "Global International Relations (IR) and Regional Worlds: A New Agenda for International Studies," *International Studies Quarterly* 58, no. 4 (2014): 647-659; Andrew Hurrell, "Can the Study of Global Governance be Decentred?" in *Global Governance from Regional Perspectives. A Critical View*, ed. Anna Triandafyllidou (Oxford: Oxford University Press, 2017): 25-44; Knud Erik Jørgensen and Tonny Brems Knudsen, eds., *International Relations in Europe: Traditions, Perspectives and Destinations*, vol 44 of *Routledge Advances in International Relations and Global Politics* (London: Routledge, 2006).
- 3 Sebastian Conrad, *What Is Global History?* (Princeton: Princeton University Press, 2016).
- 4 Gurminder K. Bhambra, *Connected Sociologies* (London: Bloomsbury Publishing, 2014); Gurminder Bhambra, *Rethinking Modernity: Postcolonialism and the Sociological Imagination* (Basingstoke: Palgrave, 2007).
- 5 Maiken Gelardi, "Moving Global IR Forward — A Road Map," *International Studies Review* (2019): doi: 10.1093/isr/viz049.
- 6 Peter J. Katzenstein, *A World of Regions: Asia and Europe in the American Imperium* (Ithaca, NY: Cornell University Press, 2015).
- 7 Tanja Börzel and Michael Zürn, "Contestation of the Liberal Script" (2020), *SCRIPTS Working Paper Series* no. 1, Berlin: Freie Universität Berlin.
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- 9 For the first and brilliant overview of the field see the forthcoming: Yannis Stivachtis, Didier Bigo, Thomas Diez, Evangelos Fanoulis, and Ben Rosamond (eds) "The Routledge Handbook of Critical European Studies" (London; New York: 2020).
- 10 Kate Sullivan in this volume.
- 11 See footnote 8.
- 12 Gayatri Chakravorty Spivak, "Can the Subaltern Speak?" in *Can the Subaltern Speak? Reflections on the History of an Idea*, ed. Rosalind C. Morris (New York:

Columbia University Press, 2010): 21-78.

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14 See inter alia: John M. Hobson, *The Eurocentric Conception of World Politics: Western International Theory, 1760-2010* (Cambridge: Cambridge University Press, 2012); Peo Hansen and Stefan Jonsson, *Eurafrica: The Untold History of European Integration and Colonialism* (London: Bloomsbury, 2014); Kalypso Nicolaidis, "Southern Barbarians? A Postcolonial Critique of EU-niversalism" in *Echoes of Empire: Memory, Identity and Colonial Legacies*, Kalypso Nicolaidis, Berny Sèbe, and Gabrielle Maas, eds. (London: Bloomsbury, 2015): 281-302; Félix Krawatzek, "Collective Memory," *Oxford Bibliographies* (2020); Toni Hastrup, "EU as Mentor? Promoting Regionalism as External Relations Practice in EU-Africa Relations," *Journal of European Integration* 35, no. 7 (2013): 785-800; Olivia Rutazibwa, "From Conditionality to Operation Artemis: Humanitarian Interventions in Sub-Saharan Africa and Local Agency," *Studia Diplomatica* 59, no. 2 (2006): 97-121; Thomas Diez, "Normative power as hegemony," *Cooperation and Conflict* 48.2 (2013): 194-210.

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27 Many contemporary Oxford scholars have written critically about the unfinished business of decolonisation, from Danny Dorling's *Rule Britannia* to Robert Gildea's *Empires of the mind*, Elleke Boehmer's *Post-colonial Poetics*, Miles Larmer's *Kataganese Gendarmes*, Sally Tomlinson's *Education and Race from Empire to Brexit* or my own *Echoes of Empire*.

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IR'S RECOURSE TO AREA STUDIES: SILOISATION ANXIETY AND THE DISRUPTIVE PROMISE OF EXCEPTIONALISM

207

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Area Studies is the typically interdisciplinary and close study of specific geographical areas of the world. In its more successful forms, it engages in knowledge production that is self-reflexive, methodologically and theoretically aware, and wary of the application of generalised models to localised conditions.ⁱⁱ Area Studies promises the deep empiricism that can access local-actor theorisations of the international and undo the Western-centrism of International Relations (IR). At the same time, IR's recourse to Area Studies throws up perceptions of risk among some thinkers of the international: of fragmenting the discipline into regional or national silos and thereby producing new parochial formations, an alternate politics of domination and silencing, and ultimately, theoretical degeneration. It is the perception of these risks that I refer to in this short essay as 'siloesation anxiety' and to which I seek to respond by embracing an unlikely analytical resource and counterforce: exceptionalism. I make two analytical moves: framing exceptionalism first, as inherently extra-local and second, as a useful method of casing. Then, to illustrate my argument, I draw briefly on narratives of nuclear exceptionalism in South Asia and examine the relational work they do in framing the global in the local.

The tension between emancipation and risk within scholarly debates over the diversification of the discipline of IR is not new. Disciplinary pluralism has been championed for its potential to remake the boundaries of the field and to challenge its dominant assumptions; it has also been critiqued as a conduit to incoherence, and as an impediment to the accumulation of unified knowledge.¹ The same tension resurfaces in the nascent Global International Relations (Global IR) scholarship.

i My thanks to Christopher Gerry and Gilberto Estrada Harris for detailed and thoughtful feedback on this essay. I am also grateful to the three anonymous reviewers of this guest section for their excellent literature recommendations.

iii Again, my thanks to Christopher Gerry for discussions around the promise and power of Area Studies in the context of departmental planning within the Oxford School of Global and Area Studies (OSGA), as well as to the participants of the European Area Studies Networking event convened by Timothy Power, Head of OSGA, from 30 to 31 January 2020.

Global IR seeks both greater inclusiveness and richer understandings of world politics.² Its concern is to understand the ways in which a diversity of actors ('we' IR scholars included) co-produce the global from different locations and with varied intentions, aspirations, and power resources.³ By privileging multiple socially and historically contingent constructions of the international, Area Studies can deliver the first of the two steps in the reconstruction of the discipline that Global IR imagines. However, if Area Studies only prioritises the particular and the exceptional, it can less obviously take the second step, of convening multiplicity into a unified project that contributes to the development of global theory. Implicit assumptions about the insular nature of Area Studies provoke nervousness that 'going local' will lead to a proliferation of multiplicities and therefore disciplinary decentralisation, rather than conventional grand or mid-range theorising. Recent Global IR scholarship has argued that the development of national schools of IR – a Chinese, Indian or Brazilian IR – and the production of exceptionalist national or regional claims, presents a specific kind of fragmentary threat.⁴ These exceptionalist narratives, so the warning goes, silo the discipline and function as an obstacle to the ideational interchange that is needed to globalise IR.

Here, I argue that exceptionalist narratives can be leveraged as a significant analytical resource within Global IR. Specifically, they offer one solution to the challenge of bridging general IR theoriesⁱⁱⁱ and local-actor theorisations of the international. Exceptionalist narratives can reflect the global as much as the local, respond to hegemony, and manifest resistance. This is because beyond the hegemonic core of mainstream IR and its spatial, political, economic, cultural, and racial substrate, 'the West', we very often find that the global is embedded in the local. If the hegemonic structures and logics at work at the global level in part *constitute* the local, then to study the local is also to study the global. What is required is a method through which to engage global-in-local narratives in a way that purposefully disrupts and remakes global theories.^{iv}

The first part of my argument rests on the claim that while exceptionalist narratives may *appear* parochial, they are always in some way extra-local – that is, they reach beyond the local to embrace parts of a wider context. While we might find it intuitive to differentiate between exceptionalist framings produced by policymakers on the one hand, and scholars on the other, exceptionalism-as-practice by definition does the work of highlighting the unique and the particular against one or more

iii Of course, there is an argument that general IR theories, too, most often emerge from local-actor theorisations.

iv While Gerlardi proposes 'different applications', 'revised versions', and 'homegrown theories' as three very useful strategies for 'going local' in Global IR, none aim for this form of radical disruption, see: Gerlardi, 'Moving Global IR Forward—A Road Map,' 9-12.

objects or contexts of comparison. In the practice of exceptionalism – whether narrated by scholars, practitioners or scholar-practitioners – we see not only things that people are doing, thinking, or observing in a particular location and time, but also the ways in which they place their doing, thinking, or observing comparatively within a broader global and historical context.

Numerous scholars have argued that exceptionalism is unexceptional, but it is also the case that not all exceptionalisms are created equal.⁵ Narratives of exceptionalism as they have been produced within the United States and Western Europe have worked to silence the non-West. American exceptionalism elevates the United States above the rest of the world both in discourse and in practice, seeking to transform the global in the image of the United States. But even US exceptionalism validates the point I seek to make about the global in the local. The emergence of US exceptionalism centred on a mapping of the global: distinguishing the United States from other nations, in particular from ‘the historical trajectories... attributed to Europe, to the Soviet Union, and to the Third World’.⁶ Like other forms of national and civilisational exceptionalism, US exceptionalism carries with it a particular evolution and empirical content rooted in politicised modes of differentiation from other nations and other civilisations.⁷ It was (and perhaps still is) inherently comparative.

Exceptionalism elsewhere might be different. Exceptionalist self-narratives can function as a response to hegemony as much as a tool of domination. Exceptionalist framings offer an important strategy for scholars and practitioners alike who seek to construct narratives within and about subordinate states and societies that are positioned in a global hierarchy structured by patterns of material, institutional, and ideological hegemony.⁸ If we agree that global dynamics and logics are nearly everywhere, in the form of ‘geopolitical competition and of new security threats; logics of global capitalism... and logics of social and technological change’, then wherever we study, we will find variations of these global dynamics and logics.⁹ It is unsurprising then that attempts to narrate and order the self, or to make sense of a given state and society from within, will also respond to, and develop narratives, no matter how implicit, about global dynamics and logics.

If exceptionalist framings are narratives of both the local and the global, how do we turn this observation into a method that contributes to theory building at the global level, and why might exceptionalism be particularly well suited to such a method? The second part of my argument draws on a conception of casing developed in the work of social theorist Michael Burawoy. Burawoy builds on the methods of the Manchester School, where a case study is selected not to illustrate a theory or extract a general rule, but on the basis of its disruptive potential. Important is not to seek to establish a ‘case’ as typical or representative.

Instead, we choose a case on the basis that it is an anomaly that *requires* a modification of existing theory.¹⁰ This is quite distinct to the idea of looking for a misfit between theory and empirical observations while at the same time remaining tied to the terms of existing debate and the frames of an existing analytical model. The onus is on producing theoretical change: dominant theories and concepts *must* evolve and respond to the challenge presented by the case, or even be replaced. Here we find a means to reconstruct general theory.

If our core objective is to seek out the cases that disrupt the narrative of casing implicit in a 'grand' or general theory, then exceptionalism does part of this work for us. Exceptionalism's focus on uniqueness places local doing and thinking comparatively and along lines of similarity within a broader global and historical context but is intended to highlight difference. For this reason, exceptionalism pre-cases the local in reference to dominant understandings of the global: it already alludes to the most different. Indeed, exceptionalist narratives, either as an object of study or the first step in our own efforts to read the local, not only tell us how local narratives frame the primary deviations from, or disruptions to, general global or grand theoretical narratives. They also contain important information about what local narratives consider those general global or grand theoretical narratives to be.

To illustrate the value of exceptionalism as an analytical resource, I draw briefly on narratives of Indian and Pakistani nuclear exceptionalism to explore some of the ways in which exceptionalism can function as an analytical resource. What is clear is that aspects of the global are a core feature of the local in these exceptionalist narratives. This must be so, because a central function of these narratives is to do the work of resistance in relation to hegemonic nuclear narratives.

India's exceptionalist narratives of moral superiority in relation to its stewardship of nuclear materials span several decades and have evolved from claims of self-restraint through the renunciation of nuclear weapons, to restraint in the possession of nuclear technologies, and, more recently, to restraint in the testing and possession of nuclear weapons.¹¹ Restraint claims persist as a mechanism of differentiating Indian behaviour within the global nuclear order, centring more recently on what Rajesh Basrur has referred to as 'minimalist' doctrine and practice, for example through the maintenance of small nuclear arsenals, a public commitment to no-first-use, and de-alerting.¹² Moral superiority is just one feature of India's nuclear exceptionalism, but it possesses great disruptive potential in view of the implicit assumption of much nuclear discourse, particularly in the United States, that implicitly frames non-Western states as irresponsible stewards of nuclear technology.¹³

Certain exceptionalist ideas about Pakistan's nuclear programme also resist and challenge the ways in which Muslim countries have been disproportionately subject to anxiety about the spread of nuclear

weapons. The connection between Islam and the bomb originated in Pakistan in the early 1970s, where nuclear weapons held promise to enhance the country's status within the so-called Muslim world.¹⁴ From the late 1970s, 'Islamic Bomb' became a term used by Western states to express fears around, and justify control of, the spread of nuclear weapons to Muslim countries, with attention paid to Iran in particular.¹⁵ After Pakistan tested nuclear weapons in 1998, some scholars drew attention to the status of Pakistan's bomb as the first in the Islamic world.¹⁶ The idea of a bomb for Muslims gained salience for its resistance to historical assertions in the West of Muslim irresponsibility with nuclear technology.¹⁷ The irony of the idea of a bomb for Muslims is that it resists and challenges the dominant Western narrative that an 'Islamic Bomb' is inherently more dangerous.

How can we use these insights to purposefully disrupt general theorising about nuclear proliferation behaviours? Scott Sagan's well-known theoretical model of the spread of nuclear weapons rests on three explanations: national security, domestic political logics, and normative symbolism. Despite engaging with norms and drawing on cases across the globe, Sagan's account does not transcend Western-centrism in terms of its theoretical assumptions. To explain weapons acquisition, the model relies on linkages between national security, prestige, and nuclear weapons embedded firmly in a realist tradition. To engage with decisions to enact restraint in weapons acquisition, it draws on assumptions about the power and attractiveness of ordering ideas and institutions of the 'international' liberal order. Sagan's 'norms model' in particular, examines how state behaviour is shaped by shared understandings of legitimacy and appropriateness.¹⁸ Nowhere does this framework engage seriously with the political contestation around these norms that emanates from subordinate positionalities in the global nuclear order, and the behaviours of resistance and selective compliance that follow as their consequence.

Exceptionalist narratives of Indian and Pakistani nuclear weapons decisions render visible the role of resistance to externally imposed racial and religious hierarchies, and strongly held convictions not just about the value of nuclear technologies themselves but also about the right to equal access to technologies of the modern. They also problematise implicit assumptions about the inherent moral value of the Nuclear Non-Proliferation Treaty (NPT) regime and any sense of a clear choice between its acceptance or rejection. Indian and Pakistani elites alike have criticised how the regime tolerates unequal outcomes and is permissive of selective nuclear excess, even as they have instrumentally leveraged parts of the regime themselves in efforts to legitimise their own and delegitimise one another's stewardship of nuclear technology.¹⁹ This is because the NPT regime is not simply a site of moral and political contestation, but as a core hegemonic structure of global nuclear order, it

is also a powerful resource.

Amidst my effort to argue that exceptionalism can manifest as a practice of resistance as well as domination, I remain aware that we should not read that resistance in a sanitised way. As a practice of resistance, exceptionalism can seek relationships of solidarity, or it can (re)produce forms of hegemony that exclude the less powerful. In both the case of India and Pakistan, below the level of the state, these exceptionalist narratives themselves enact dominance: whether we engage with state repression, justified through dominant developmental and nationalist discourses in the context of local resistance to the construction of nuclear power plants in Maharashtra, India; or with the ways in which Indian official narratives about racial exclusion in the global nuclear order under the Bharatiya Janata Party-led governments of the 1990s also drew on racist discourses about Islam and Muslims; or consider how anti-bomb lobbies in both India and Pakistan have been infantilised, branded anti-national, and ultimately silenced.²⁰ To point to the analytical utility of exceptionalist framings in subordinate states in the global hierarchy is not to ignore their real world potential for domination, as well as resistance.

In this short essay, I have proposed that one means through which to alleviate siloisation anxiety is to embrace its imagined core risk: exceptionalism. We should do so with care, being sure to leverage exceptionalism as a means to disrupt dominant narratives of the global (or general IR theories) and being sure not to ignore its capacity for both resistance and domination. The disruptive analytical potential of exceptionalism moves us towards an understanding of the global and the local not as two separate things in need of dialogue or reconciliation, but as already coexisting in a specific place and time, and in constant co-constitution.

Notes

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Amitav Acharya
American University

In this feature interview for STAIR's Guest Section on the relationship between IR and Area Studies, STAIR spoke with Amitav Acharya, the UNESCO Chair in Transnational Challenges and Governance and Distinguished Professor at the School of International Service, American University in Washington, DC. Professor Acharya is the first non-Western scholar to be elected (for 2014-15) as the President of the International Studies Association (ISA), the largest and most influential global network in international studies. He has received two Distinguished Scholar Awards from the ISA, one in 2015 from its Global South Caucus for his 'contribution to non-Western IR theory and inclusion' in international studies, and another in 2018 from ISA's International Organization Section that recognises 'scholars of exceptional merit...whose influence, intellectual works and mentorship will likely continue to impact the field for years to come'. STAIR spoke with him about disciplinary debates within IR and Area Studies, how the COVID-19 pandemic might shape global IR, and his advice for younger IR scholars.

This interview was lightly edited for clarity.

St Antony's International Review (STAIR): Thank you for joining us for this interview, Dr Acharya. Could you explain for the readers of STAIR where the contemporary debate on Area Studies versus disciplinary studies such as International Relations [IR] stands? What are the common arguments that proponents of each field of study put forth?

Professor Amitav Acharya (AA): To be clear, when I mention 'discipline', I am speaking here only about International Relations and its relationship with Area Studies. But much of this can apply to other branches of social sciences and humanities.

The debate you talk about, which was pretty intense in the 1990s, seems to have cooled down a bit. But a little background is useful here. I first dealt with the debate in my 2001 keynote speech to the founding of the Asian Political and International Studies Association [APISA], 'Identity without Exceptionalism', which became my motto for exploring what a regionally-based knowledge community can do to engage with a disciplinary approach like IR without falling into the trap of culturalism and exceptionalism.¹ Some of my responses below are drawn from such earlier work.

At the risk of simplification, a stark way to describe the earlier tension between IR and Area Studies would be that the former saw Area Studies spending too much time in the field, disdaining theory and concepts or being ignorant of it, shunning comparative work, and spending more time with their cameras than with their minds. Area specialists for their part took the view that disciplinary scholars were nothing more than 'armchair' philosophers who applied bookish knowledge to history or contemporary developments to develop or test big abstract concepts without bothering to see or experience things for themselves. This earlier tension was always exaggerated, although I can think of area specialists who stayed away from conceptual or theoretical work and IR scholars who were scarcely interested in the traditions and developments in the non-Western world.

Let me offer a little personal reflection here. To be honest, when I first came across this so-called debate, I could not quite understand what the fuss was all about. To me, there was no clear separation, except perhaps that IR scholars were interested in IR theory, and area specialists were more interested in concepts and theories from a variety of disciplines, including political science, history, sociology, anthropology, and even IR! I myself was interested in both, for example, my 'localisation' model of norm diffusion drew from Constructivism—itsself with a close affinity with sociology and art history—especially diffusion of Hindu-Buddhist art from India to Southeast Asia. Hence a great deal of my fieldwork involved travelling around the magnificent monuments and ruins of Angkor, Borobudur, Champa (southern Vietnam today), Bagan, to see how Hindu-Buddhist monuments and imagery travelled and adapted from place to place, which shows the primacy of local initiative and local agency over foreign ones.

It's also important to keep in mind that this sharp distinction between IR and Area Studies was always more of a debate in the United States than elsewhere. The vast majority of the IR community outside the United States and the West does not care about that divide. In many parts of the world, including Europe, there was never a clear separation between Area Studies and IR. Indeed, throughout the Global South, such as India, the arrival of IR as a discipline rode on the back of Area Studies. I can give you examples, such as the late Michael Leifer of the London School of Economics, whose work on Southeast Asia and the Association of South East Asian Nations [ASEAN] was a major inspiration to me, and who I always thought stood above the Area Studies-discipline divide.

Now, even in the United States, there is a realisation that the two—i.e., Area Studies and disciplinary approaches—are closely linked. Some would say even symbiotically linked. A new generation of scholars have combined disciplinary IR with deep Area Studies expertise. Speaking about IR, the advent of Constructivism, with its emphasis on culture and identity, facilitated this trend, as did the move away from parsimoni-

ous IR theorising, or the inter-paradigm debates such as between Idealism and Realism, or similar big debates between rationalism and Constructivism. The decline of big debates meant the rise of middle range theorising, which is good for reconciling Area Studies and disciplinary approaches to IR.

A related point: one of the reasons for the pessimism about the future of area studies in the 1990s was the rise of globalisation. We now know that globalisation did not 'end' Area Studies, but moved it into new directions.

STAIR: In your leadership of the International Studies Association [ISA], you have also advanced the idea of a 'Global International Relations' and have published a number of works advancing this field. How does Global IR situate itself within this debate on Area Studies and IR?

AA: Global IR is deeply interested and embedded in Area Studies. Indeed, Global IR brings IR and Area Studies together. As you know, ISA is the International *Studies* Association. It is much broader than IR. But as someone who was trained in and committed to both disciplinary IR theory as well as Area Studies (mine being Southeast Asia), as ISA President, I wanted to integrate the two as much as possible. My Presidential theme was 'Global International Relations and Regional Worlds: A New Agenda for International Studies'. The 'Regional Worlds' concept was my code for Area Studies. Indeed, it was originally developed by Area Studies scholars from the University of Chicago, such as Arjun Appadurai.

In the Regional World concepts, I wanted to give a place of prominence to those who study regions and regionalisms, a good number of which are likely to be area specialists. Hence a core element of Global IR is that it integrates the study of regions, regionalisms, and Area Studies. Some people asked me why I did not call it Global International Studies. I had agonised much about this before settling for the term and decided for Global IR because I wanted to target IR theory and IR scholars. The idea of IR theory is more commonplace than theories of International Studies. International Studies is already more multidisciplinary and more inclusive of Area Studies than IR, which was, and remains, behind the curve. IR theories, with exceptions such as postcolonialism, are Euro- and American-centric and needed to be exposed and challenged. And it is these theories and their theorists who are most uncomfortable with Area Studies and this is part of the reason behind the discipline-Area Studies divide. It was time to bring them out of their own comfort zones.

STAIR: Another critique that arguably applies to both IR and Area Studies is that both fields of study are rooted in Western-centric approaches and can often reproduce ethnocentrism. Can these two fields interact and work together to overcome such epistemic hegemonies, and if so,

AA: There are two separate if related questions here. One is about the Western-centric approaches to IR and Area Studies; the other is how these two fields (IR and Area Studies) can work together.

When we say IR is a Western-centric—European and United States—discipline, it means many of its foundational concepts or theories are derived from European or US experiences. Hence, for IR scholars in the West, Area Studies often meant looking at Europe, the US, and other Western countries. Without too much exaggeration, one might say that IR, which Stanley Hoffmann once described as an ‘American social science’, has also been an area studies of the trans-Atlantic sphere. Theories such as Hegemonic Stability Theory, Liberal Internationalism, and much of Neo-Realism and Democratic Peace, are popular in the US because they reflect the life-history of the United States and its cultural progenitor, Western Europe, including Great Britain.

Area Studies may seem a little freer from Western-centrism, but some of the concepts that have influenced research in the Area Studies tradition, such as the concept of state, development, nationalism, to give a few examples, mirror IR’s Western-centric bias. In this sense, the field of Comparative Politics, which is a major approach for Area Studies scholars, is similar to IR.

Turning to the second part of your question, how IR and Area Studies can work together, there are different ways, but in my own work, I have suggested two potential avenues for a creative synthesis between the two, which I would call ‘disciplinary area or regional studies’ and ‘transnational area studies’. These were first proposed in my paper for the 2005 St Antony’s Workshop on the Future of Interdisciplinary Area Studies in the UK in December 2005.² Let me borrow the language of that paper a bit.

Disciplinary regional studies includes scholarship that studies a region or area primarily from a disciplinary perspective, be it IR, comparative politics, sociology, etc. Disciplinary Area Studies itself has two orientations. This includes scholars who may be termed ‘regionally-oriented disciplinarians, or social scientists, to use an American term’, and ‘discipline-oriented regionalists’. The former’s main specialisation is theory, although as is usually the case in IR, much of it is usually drawn from Europe and the US global role, but they have been attracted to a region for a variety of reasons.

If we think of Asia as an example, these attractions may include including its economic rise, and the growing importance of Asian powers—China, Japan, and India, and Asian regional institutions. This in contrast to the earlier attention to Asia from International Relations scholars, which was mainly due to its role as a Cold War flashpoint. The latter category, discipline-oriented regionalists includes scholars whose

initial primary focus might have been on regional affairs, but who have now increasingly embraced theory, not the least because of the entry of the regionally-oriented disciplinarists, whose contribution has been to inspire younger scholars from the region to undertake theory-guided research.

Transnational Area Studies—it may also be called ‘Transnational Regional Studies’—scholars are primarily trained in regional affairs, or in the Area Studies tradition, but they are also interested and involved in comparative research on trans-regional phenomena, especially those linked to the effects of globalisation. And they do so not necessarily from any particular disciplinary perspective, even though some might have been so trained. Unlike disciplinary Area Studies scholars, transnational regionalists are not necessarily theory-guided, but are interested in looking beyond their respective areas and hence in comparative studies of issues which are transnational in scope, such as nationalism, pandemics (AIDS or COVID-19), terrorism, etc.

These two above approaches are not mutually exclusive. One could combine these types of intersections and hybridity to think of a Global Area Studies approach. I am aware of the Global and Area Studies framework, but Global Area Studies keeps some of the original flavour of the rich Area Studies tradition; perhaps as a constituent element of Global IR that I have discussed above. To me, the terminology is less important than the purpose, which is make sure that concepts derived from Western experience are not imposed upon other societies, but we develop approaches from different societies on their own terms, compare and contrast them, and develop more general but differentiated frameworks for area studies.

STAIR: You situate yourself within the field of IR. Can you outline how you and other senior scholars engage with Area Studies? How does an Area Studies perspective influence and enrich your own research? In what ways, if any, does it complicate your research?

AA: There are so many good examples of senior scholars engaged in both IR and Area Studies, each broadly defined. Going by the principle of a person is known by the company he/she keeps, I would give examples of people I know well or interacted with, but I should warn you that any such attempt to classify or characterise scholars is always a bit uncertain and may not be acceptable to them. It is also important to keep in mind is that IR is a broad field and not all IR scholars do theory but their work has its place in IR, especially if it is based on rigorous empirical work and addresses big topics, such as regionalism, regional order, nationalism, revolution, development, and power transition, and addresses them in a highly analytical manner, engaging in academic debates, addressing key unresolved puzzles, and pointing to long-term trajectories. To me, this is

where Area Studies' knowledge and approach, and IR become allies, not enemies.

For examples, you have Iain Johnston and Tom Christensen in the USA who combine IR theory and the study of China. I would call them regionally-oriented disciplinarians, as mentioned above. Thomas Risse and Tanja Börzel in Germany are prominent examples of a vast number of scholars who do IR theory, comparative regionalism as well as Europe/the EU. On the other hand, we also have Evelyn Goh at the ANU [Australian National University] working on China and Southeast Asia from an IR perspective. Scholars like her are strongly grounded in a region but are at ease with IR theory. I would call them discipline-oriented regionalists.

Many IR scholars at Oxford have a regional focus, and I would include here Andrew Hurrell (Brazil), Louise Fawcett (Middle East and Latin America), Rosemary Foot (China and East Asia), Kalypso Nicolaïdis (EU). They would fall into such hybrid camps—again I hope I am not offending anyone. I would also place Chinese scholars such as Qin Yaqing and Yan Xuetong in this category, working on IR theory and China.

If you look at postcolonial IR scholars, many of them work on theory while also focusing on specific regions, and beyond. Shankar Krishna (South Asia), Robbie Shilliam (Caribbean and Africa), and Randolph Persaud (Caribbean and United States); in the United Kingdom, Rahul Rao and Sanjay Seth are important postcolonial scholars with a regional interest in South Asia. In India, Navnita Behera at Delhi University, Kanti Bajpai, now based in Singapore, are fine examples of scholars who combine IR and South Asian studies who are not postcolonial theorists.

John Ikenberry and Peter Katzenstein are two American scholars who are not area specialists per-se, but have a strong focus on East Asia, admittedly developed a bit later in their careers, but significant nonetheless. In that sense, they are very different from Robert Keohane, Stephen Krasner, or the late Kenneth Waltz, and Robert Gilpin, whose interest in a particular region beyond the United States or Europe is unknown to me.

STAIR: How do you see the emerging COVID-19 pandemic as reshaping the global world order, particularly as it relates to discussions about Area Studies and IR?

AA: A caveat here is that it is too early to make any generalisations, much less predictions. A lot depends on how long COVID-19 might last and how effective the vaccine and treatment for the disease would turn out to be. But if the virus persists, even with some prevention and mitigation, it might still reorient Area Studies fundamentally. It would discourage and restrict classic fieldwork, which is absolutely essential to not just to Area Studies scholars, but also to many, if not all, IR scholars. This might mean

a turn to more digital fieldwork, remotely carried out. Luckily, we now have excellent technology which was not available to past generations of area specialists. But would this satisfy area specialists who love travel and being in the field so much?

The pandemic could also induce greater reliance on archival work, especially those archives that offer digital access. But these tend to be more in the developed countries, which means work on countries that have poorly digitised archives, will suffer. There could be a trend to do fieldwork among migrants and diplomats in one's country of residence, which might still be good, but again not a substitute for going to the country of research itself. Also, there would be more interest and focus on countries with fewer entry or quarantine restrictions. This would be really unfortunate; apart from skewing interests and research, my fear is that authoritarian countries might use the pandemic to restrict access to researchers from outside. If this persists, it might make IR and Area Studies less global.

The pandemic might increase interest in and understanding of how the existing world order is changing. This was already happening before COVID-19, especially with the crisis and decline of the Liberal International Order. If COVID-19 puts a further brake on globalisation, as is likely in the short-term at least, this could accelerate trends towards a more regionalised, pluralistic world, with a more diversified system of global and regional ordering and governance. In other words, we might see more multiplexity in world order, rather than multipolarity, which focuses mainly on great power material capabilities.

I have argued before in *The End of American World Order* that the emerging world order would be post-hegemonic.³ No single power can dominate it the way Britain once did and then the US has since the nineteenth century. I do not see China replacing the US in that role as a global hegemon. COVID-19 has called into question the standing of both the US and China, neither of which could arrest the virus in the early stages of its spread in their own countries, and then engaged in a war of words blaming each other, to the horror of the rest of the world.

With growing transnational challenges, arrested globalisation and lack of trust in either US and China, or even the self-anointed 'role model' of regionalists, the EU—whose initial response to COVID-19 was also questionable—we could see a more diverse or pluralistic world. The Area Studies scholarship could have new opportunities to look at other actors, topics, and approaches that might define the relationship between the local and the global, or regional and world order.

STAIR: STAIR, as a student journal, tends to attract both authors and readers who are emerging scholars, including graduate and doctoral students as well as early career researchers. What are your suggestions for these groups of younger scholars as they traverse the Area Studies/IR

AA: First, try to keep in mind that the so-called Area Studies-discipline debate was to some extent a false debate, overstated, very US-centric, and while it may persist to some degree, it has lost its relevance. One should view the two approaches not as mutually exclusive, but complementary. Second, look for new ideas and concepts from non-Western sources, including histories and contemporary trends to mitigate the Western-centric nature of current theories of major disciplines. Third, take a serious look at the hybrid approaches, combining disciplinary and Area Studies, such as the what I have described above as Disciplinary Area Studies and Transnational Regional/Area Studies. Fourth, despite the challenges posed by COVID-19, do not abandon the classic Area Studies mindset and approach, such as learning a new language and doing fieldwork wherever possible. Fifth, be optimistic. Change is painful but also exciting. The global transformation happening right before us now is opening up new horizons of research, a richer menu of themes and new possibilities of advancing knowledge. There is also the possibility that the setback to, or possible reversal of globalisation might increase demand for Area Studies knowledge as it might increase the importance of regions and regionalisation. Finally, think of alternative careers. Being an author, translator, think-tanker, and journalist are terrific ways to make good use of Area Studies knowledge. There is nothing new about these careers, but new technology for online education, conferencing, and working at home will have an impact on professional opportunities, both good and bad. Make the most of the new opportunities presented.

Notes

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2 Amitav Acharya, 'International Relations and Area Studies: Towards a New Synthesis?' (paper presented at the Workshop on the Future of Interdisciplinary Area Studies in the UK, St Antony's College, University of Oxford United Kingdom, December 6-7, 2005).

3 Amitav Acharya, *The End of the American World Order* (Cambridge, United Kingdom: Polity Press, 2014).

Editorial Introduction

Cody Bock, Gülce Özkan, James Sweetland,
and Aman Thakker

In recognition of STAIR's fifteenth anniversary edition, this year's General Section Editors have looked back across our short history to explore how we have covered four defining global trends from this era. This process has revealed some remarkably prescient predictions in our coverage, as well as the evolution in the academic debate concerning each of the topics we have selected. We begin with James Sweetland's account of how STAIR has covered cybersecurity issues, followed by Cody Bock's analysis of decolonising knowledge production. Gülce Özkan then explores the relevancy of STAIR's inaugural edition and its theme of international cooperation, and finally, Aman Thakker concludes by examining our coverage of the rise of China as a global power.

Cybersecurity Issues in STAIR by James Sweetland

Looking back across STAIR's history reveals a characteristically diverse blend of methodological and intellectual perspectives on internet governance and cybersecurity trends, clustered in the three editions dedicated to digital topics. Intriguingly, each of these issues were published exactly six years apart – in 2007, 2013, and then 2019. Of course, developments in cyberspace have been a frequent topic in General Section pieces throughout many issues of STAIR, regardless of their theme. But this six-year division provides for particularly interesting reading in retrospect, allowing sufficient time for comparisons to be drawn between rapidly evolving digital eras, but not so much time that major developments are inadvertently omitted.

The first of these issues, published in May 2007, was entitled: *The Internet: Power and Governance in a Digitised World*, and comprised a broad set of essays covering Chinese internet governance, citizen journalism, and the development of data-mining practices in counterterrorism.¹ Following this, in February 2013 came a similarly-titled issue: *Power, the State and the Social Media Network*.² In reflecting on the Arab Spring in 2011, contributors to this edition were able to frame questions of digital power dynamics around the legacy of these momentous uprisings – movements attributed, in no small part, to the development of instantaneous and decentralised communications networks. A further six years later, in May 2019, came STAIR's most recent edition on this

theme: *Whose Security is Cybersecurity? Authority, Responsibility and Power in Cyberspace*, which concerned more complex technological trends, including active cyber defence, while evaluating the normative debates which shape global approaches to digital security.³

In reviewing these past editions, drawn widely from our fifteen-year history, several notable themes can be identified in our coverage of digital trends. First, STAIR has always sought to provide a critical examination of the Internet, viewing it as something more than a mere technological black box. Instead, our authors have followed Majid Yar's interpretation of the Internet as embodying 'a set of social practices' beyond its technological architecture.⁴ Where computer scientists view cyberspace as protocols and software updates, STAIR sees power relationships and sites of international contestation. Thus, in Gary Rawnsley and Daniel Koldyk's debate in 2007 over the Internet's role in Chinese regime security,⁵ Vicente Chua Reyes Jr's 2013 piece on battles for control over Singaporean social networks,⁶ and Myriam Cavelty and Florian Egloff's 2019 article on state governance of cybersecurity,⁷ one can see evidence of this continued commitment to broader analyses of how the Internet has shaped international affairs. In taking this perspective, our authors have shown how different actors seek to exploit and control cyberspace, as well as politically important *cyberspaces*, in order to achieve their political and strategic objectives.

Second, one can trace the development of cyberspace through these three editions of STAIR. Reading Koldyk's response article from 2007, the suggestion that barely ten percent of Chinese citizens are full Internet users is immediately striking.⁸ In that very same issue, Diana Owen discusses the rise of new citizen journalists changing the face of modern media. Her claim that 'information disseminated by mainstream press and new media actors is becoming increasingly indistinguishable',⁹ can be read rather more pessimistically in the context of modern social media disinformation campaigns, and a United States President willing to disseminate false information to the public. Similarly, Solon Barocas's article on nascent data-mining strategies, written in 2007,¹⁰ seems to foreshadow the algorithm-driven approach to security that Wanner and Ghernaouti identify in their 2019 article on active cyber defence.¹¹ Looking back across fifteen years of STAIR, the sheer breadth and scale of the transformation in cyberspace appears to be one of the defining features of our world.

A final trend suggests some room for improvement; a need for some further intellectual diversification in STAIR's coverage, as we head into our next fifteen years. While the aforementioned two articles by Barocas in 2007 as well as Wanner and Ghernaouti in 2019 both provided sophisticated examinations of cutting-edge technological phenomena, other significant digital challenges remain underexamined in our journal. In future, the STAIR Editorial Board should aim to encourage

contributors and theme section editors to place even greater focus on socio-technological analyses of emerging threats. The most pressing of these is artificial intelligence, the most destabilising and transformative phenomenon (perhaps excluding climate change) of the twenty-first century, but others include encryption, protecting critical infrastructure from cyberthreats, and the growth of algorithms which structure our workplaces, governments, and increasingly, our lives.

Conceptions of Knowledge and Attempts to Decolonise in STAIR by Cody Bock

Originally rooted in student protests at the University of Cape Town in March and April of 2015, the Rhodes Must Fall (RMF) movement made waves across academia, both in South Africa and in higher education institutions around the world. The movement brought attention to the ways in which higher education had come to reinforce a 'hegemony of white, western fields of thought', as Professor Simukai Chigudu stated at the height of the movement.¹² At the heart of RMF was the notion of 'decolonising' knowledge production; that is, to problematise the way academia has foregrounded western thought — through course curricula, academic publication, and dissemination of qualified knowledge — and to promote the scholars and alternative knowledges that had heretofore been silenced.

The decolonisation movement is not beyond the scope of the International Relations (IR) discussions which have filled the pages of STAIR over the past fifteen years. As Branwen Gruffydd Jones explained, IR is plagued with 'wilful amnesia' when it comes to the issues of race, colonialism, and imperialism, addressing which is necessary for constructing a non-Eurocentric framework of IR.¹³ Indeed, she states that such a decolonised framework could offer 'the possibility of revealing nonimperial and anti-imperial histories, values, struggles, ideas, and ways of being' which are vital to the continued relevance of the discipline.¹⁴ In light of the reinvigoration of the RMF movement in 2020 and the accompanying calls to decolonise higher education, it is important to examine how STAIR's past editions have conceptualised knowledge and have made efforts to decolonise knowledge production in practice.

Central to understanding STAIR's interaction with knowledge production is the 8.1 edition, published in 2012, which was themed, *The Knowledge Commons: Research and Innovation in an Unequal World*. While predating the RMF movement, the edition draws on the idea of knowledge as a 'global commons' and, through this lens, highlights the power and ethical contestations occurring in such a space. Echoing Chigudu's aforementioned stance, the editors write that 'the evidence for systemic status quo bias reflects the pervasive impact of Northern sociocultural

and political-economic hegemony'.¹⁵ Contributor Charlotte Hess further unpacks the notion of a 'knowledge commons', depicting knowledge as a shared resource which was at once an economic good and a 'constitutive force of society'.¹⁶ She argues, in turn, for a retaking of the commons by local communities, who might render it more egalitarian and accessible. Indeed, Hess is adamant that 'useful knowledge' is plentiful worldwide, but that the landscape of the knowledge commons devalues knowledge emerging from the developing world.

Contributor Jorge Contreras continued the discussion in the same edition of STAIR with a detailed analysis of open-access publishing. The push for open access swept through academia in the early 2000s, following decades of exorbitant price inflation in academic journals. Contreras examined the avenues of open access publishing available to scholars and discussed their relevance to the actual barriers inhibiting academics in the developing world from publishing. He noted that, between 1997 and 2001, eighty-six percent of authors published in scientific journals were based in the US, Europe, Japan and Canada.¹⁷ Contreras explains the barriers to publishing for scholars based outside of these countries, and the list includes the following: few journals are published in developing countries, and those that exist are often less prestigious and excluded from international indexes; the difficulty for researchers in the developing world to be published in internationally recognised journals; peer reviewer bias against developing world authors; lack of experience preparing manuscripts and editorial support; and the dominance of English-language journals.¹⁸ More recently, research has indicated that the overrepresentation of authors based in the West still exists in academic publishing. Sarah Cummings and Paul Hoebink, in examining authorship in ten top journals between 2012 and 2014, found that forty-three percent of authors came from the US and UK, and an additional forty-three percent came from other developed countries. In the end, only fourteen percent of authors were from developing countries.¹⁹ Thus, the structural challenges that Contreras points out are far from resolved.

As the editors of the 8.1 edition wrote, 'the case studies in this issue indicate subtle yet extensive asymmetric penetration and selectivity in the inclusion of knowledge sources in common knowledge-pools'.²⁰ While both Hess and Contreras discuss such asymmetries, the themes are evoked in several other editions of STAIR, both before and after the advent of RMF.

While no other editions of STAIR address knowledge production as explicitly as the 8.1 edition, the theme of local knowledge and the emphasis on 'bottom-up' movements can be seen elsewhere in past editions. In our 1.2 edition, published in 2005, contributor Julie Taylor brings attention to how ostensibly local feminist movements have utilised global discourses to inform their activism. She argues that

this does not indicate a hegemony of global feminist and neoliberal paradigms; rather through transnational flows of knowledge, the 'global' is adapted to local context by grassroots feminist movements in Central and South America. In this way, 'the global context confer[s] new worth on local knowledge', in a dialogue that emulates Hess's description of a 'knowledge commons'.²¹

In 2014, contributor Anne-Sophie Reichert wrote for the 10.1 edition of STAIR, which centred on ideas of global justice. Reichert similarly highlighted the importance of 'local knowledge' in regulating the political sphere as she described the self-governance initiatives of Palestinian refugees in the Qalandia refugee camp. Refugees there formed committees for the purpose of governance within the camp, and Reichert found that these groups had more legitimacy than did the formal institutions of the camp. The committees relied on 'local knowledge that both Israeli and Palestinian authorities are lacking' and were 'meaningful and powerful components of the local political environment'.²² Thus, local knowledge is a critical component of debates around policy, democracy, and migration.

Finally, Anna Sands presented an intriguing analysis of 'bottom-up' environmental movements in our 15.2 edition, *Anthropocene: Embodying Climate Breakdown*. This is the only article mentioned here which was published subsequent to the RMF movement, and Sands's article contains certain synergies with the sentiments of decolonisation. She writes of 'grassroots movements with a transnational outlook' or 'grassroots globalisation', which indicates that locally-rooted movements have unique ontologies, but their similar valuation of the environment permits alliances to form.²³ Ultimately, the arena she describes is one in which localised knowledge is the foundation of the pursuit of common goals. In the context of Hess's 'knowledge commons', Sands describes a polycentric, grassroots movement where a plurality of knowledges may unite around a shared desire to preserve the natural environment.

In her concluding sentences, she notes that:

Climate breakdown is also the chance to break down the human story as we have told it so far and to tell a new one. The hope is that this new story [...] will bring about a more inclusive global narrative based on equal dialogue and open to the insights of many different societies and cultures.²⁴

Sands thereby reconciles climate change activism with calls to decolonise knowledge production. In this way, she and the other STAIR contributors demonstrate that the answers to the pressing political issues of our time may be discovered by engaging with and protecting the diversity of the 'knowledge commons'.

Ultimately, STAIR remains committed to critically engaging with conceptions of knowledge and attempts to decolonise knowledge production. In the guest section of this very edition, the conversation carries forward as some of Oxford's foremost academics weigh in on the importance of Area Studies in IR. In doing so, they chart a pathway for decolonising the IR discipline, and they resituate STAIR once again as an important platform for decolonisation debates.

International Cooperation in STAIR by Gülce Özkan

At the time of writing this introductory section for STAIR's fifteenth anniversary edition, it seems fitting to reference the title of the inaugural edition of our journal: *The Future of International Cooperation*. Essays within the inaugural edition encompassed topics from post-conflict reconstruction, to globalisation, migration, and the future of transitional justice within a global context.²⁵ Likewise, the 5.1 edition of STAIR, published in 2009, centres on Transnational Corporations and Global Governance. The articles within the edition naturally focus on the 2008 global financial crisis and the role of global institutions in perpetuating a neoliberal world order.²⁶ With the aftermath of the global financial crisis as a backdrop, 5.1 takes a more critical view of global corporations and their intrinsic place within unregulated capitalism. International institutionalism and global cooperation in the contemporary context occupy a more hopeful space, with a focus on redistribution in the context of the COVID-19 pandemic.

Given the current global health crisis, we must consider how and why the arenas within which international cooperation materialises have changed over the last fifteen years, as it is imperative that the positive effects of global cooperation overcome the inadequacies of existing structures of governance. It is worth referencing one notable contributor to our journal, Robert Keohane, who has written about neoliberal institutionalism and the potential of cooperation between advanced capitalist countries.²⁷ Neoliberal institutionalism, which emphasises the mitigating effects of international institutions on realist and anarchic world politics, is particularly pertinent now in the context of the COVID-19 pandemic. Keohane's question, 'Can cooperation persist?', has never been so pressing as in the present, when the success of the international order and diplomatic relationships dictate life-or-death outcomes for millions across the globe. Whether one holds a normatively positive view of global institutions or not, we are situated in a historic moment in which it has become imperative to utilise the collective influence of liberal institutions on state action and maximise the strength of decentralised cooperation, in the absence of a clear global leader. Despite the shortcomings of global institutions, the prospects for global cooperation and successful collaboration between states for peace,

security, and global responsibility sharing, as explored in the first edition of STAIR, have never been more significant. The fifteenth anniversary of STAIR coincides with a complete paradigm shift in the way humankind views the world and each other, the way we live, and the way we work. In contrast with fifteen years earlier, we are writing within a cosmically different context.

A clear consensus is now emerging among economists and policy advisors that the effects of the pandemic are far greater than the economic crash of 2008 and that the scale of contraction in the global economy will outweigh that of the 2008-09 global crisis – the Great Depression of the 1930s offers a closer comparison.²⁸ In the 1930s, it took the US economy nearly three years to reach the level of contraction – twenty-six percent – that has materialised in just three months in 2020. It is therefore inevitable that one would attempt to draw lessons from the Great Depression to confront the current crisis. One of the worst outcomes of the widespread economic depression was that world economies became less open and more insular, advancing the tenets of protectionism.²⁹ In parallel, the resurgence of zero-sum economic nationalism is one possible risk outcome of the COVID-19 pandemic. What arises from this crisis in terms of international cooperation, is critical: how will global institutionalism, collaboration, and diplomacy be constrained by the nationalist trends witnessed in the last few years? To resist an increase in protectionism and nationalism – likely outcomes of the pandemic – we must strive for a genuinely global effort that is collaborative in nature; when the solution is found, it will have to deliver for the world.

In the first editorial introduction of STAIR in 2005, Alexander Betts and Matthew Eagleton-Pierce highlighted the emerging dangers of isolationism and unilateralist responses to the September 11th attacks and the subsequent invasion of Iraq, and the risk of this supplanting the multilateral consensus perpetuated by global institutions such as the United Nations (UN).³⁰ Due to the specific dynamics of this public health emergency and the pressing need for global collaboration in producing and distributing vaccines and safety equipment, there is hope that the response will be, and must be, more cooperative. There will be tendencies to turn inwards and prioritise the national over the global, but the lessons we have learnt indicate that this has disastrous consequences: the solution will have to be globalist in its nature. Indeed, the virus can be seen as a metaphor for the terrible consequences of deregulated globalisation and free trade. Perhaps it is a warning. However, the virus is now a truly global issue with only global solutions, and whilst globalism has not worked equitably for everyone, free trade and free movement must continue in the aftermath of this crisis. The sharp and poignant questions asked by Betts and Eagleton-Pierce are of the utmost importance today: whether global responsibility-sharing can prevail

even through turbulent and shifting times, whether institutions such as the UN can adapt and reform for the better, and to what extent – and in what ways – polarisations will divide the world.

Those who adopt the rhetoric of war will not emerge well from this crisis. As the devastating effects of the virus have been seen across the globe, we have witnessed a struggle in our contemporary politics – a stubborn and unremitting emergence of the rhetoric of war, as opposed to the rhetoric of cooperation. There is a sense of competition, with the Sino-American rivalry particularly notable for the risk it poses to the global economy and the challenge of cooperation. The discursive and material failure and incompetency of the US response during this crisis has thus far been characterised by the Trump administration's decision to withdraw US funding from the World Health Organisation, with Donald Trump downplaying the suffering of his own citizens and focusing on 'competing' with China in terms of numbers of cases and deaths, rather than working towards a solution or a global risk-sharing system to mitigate the global effects of the crisis.³¹

The prospect of China overtaking the US as the dominant world hegemon has long been debated in academic circles, and is addressed in the 6.2 edition of STAIR, *China's Rise and Adapting Global Structures*.³² Nonetheless, others view this argument with scepticism; a great majority agree that this claim holds truth economically, but not yet in political and diplomatic arenas of soft power.³³ However, this could change in the event that China develops the first successful vaccine and enables successful distribution to developing countries in its quest for global legitimacy – symbolically embodying the conventional paternalistic function of the US since the end of the Cold War. This poses new challenges for the nature of global governance and international leadership in the wake of the pandemic: who emerge as the global leaders of this new world order? The implications of this leaves questions: who should, or *will*, step in now? Certainly, the US has shown abysmal leadership in the wake of this health crisis and Europe's comparatively weak performance is attributable to their lack of strong leadership, with Germany often cited as the 'reluctant hegemon' of Europe'.³⁴ This lack of European leadership and foresight in the early stages of the pandemic left Italy in the lurch, for instance; it is difficult to argue against the fact that Southeast Asian states, with China, South Korea, Taiwan and Singapore as prime examples, have controlled and mitigated the effects of the virus much more promptly and effectively, despite the anti-democratic methods utilised in some cases. Does this signal a status quo shift, and has the virus amplified or accelerated the process of this shift of power more-so towards China?

In STAIR's 11.2 edition *Negotiation in Contemporary Global Politics*, Chester Crocker et al. discuss 'Securing Leverage in Current Conflict Negotiations: The Quest for Coherence in Turbulent Times'.³⁵ In this article, they explore the multilateral character of international

mediation and the critical role of collective action and multi-party collaboration in resolving intractable global issues, and they conclude by emphasising the mediating power of ‘coalitions of actors [with shared interests]’.³⁶ As we reflect on the anniversary of this journal, we can ask ourselves: are we in a worse position to collectively confront a global crisis now, than fifteen years ago? The answer lies possibly in the affirmative, but it does not have to. A well-organised global response is not only possible, but critical in responding to the virus and thus overcoming this great generational challenge.

What we are facing is truly a paradigm shift, a seminal and generation-defining moment which we may continue to experience for a significant period. The fifteenth anniversary of our journal of international affairs could not have arrived at a more pivotal moment: a time when we look to each other, and to our common humanity, for comfort and release from a shared crisis. No event in recent history has dramatically uprooted our lives as we know it in such a fashion and on such a large scale, permeating diverse societies across the globe. During global warfare, certain regions and states of the world can opt to choose neutrality or non-participation in large-scale conflict. Neutrality is not such an option now. Like the threat of climate change, this is a problem that we must all contend with, a problem that does not arise from hostile external threats, but rather, one which originates from a global health emergency that recognises no borders, against which the only hope of victory is a well-coordinated global response. Hence, the present threats we face are all-encompassing and thus unifying in their nature. As former US Treasury Secretary, Lawrence Summers, puts it: ‘[COVID-19] is helping to usher in a world where security depends more on exceeding a threshold of cooperation with allies and adversaries alike, than on maintaining a balance of power [between nation states]’.³⁷ And so this is a pledge in favour of globalism and international cooperation; albeit a regulated globalism that does not exacerbate pre-existing inequalities in societies. To respond to this truly global challenge, we must strive for an internationally collaborative approach and reject zero-sum, self-interested politics. This is the only way to deliver a global logistical solution to this public health crisis, before it is too late. If there was a time for liberal international relations, it is now: we need a successful multilateral approach more than ever.

Conveying the Rise of China in STAIR by Aman Thakker

The second edition of the sixth volume of the STAIR, released in February 2011, marked a significant milestone in its history. Three editors for that edition – David Blagden, Justin Hempson-Jones, and Linda van der Horst – made the enterprising decision to divide STAIR into two sections: a theme section and a general section. The change has since

However, the trio also made another far-sighted choice in the topic for STAIR's first theme section with the journal's new structure. They chose to dive deep into the theme of *China's Rise and Adapting Global Structures*. The aim of this theme was to 'demonstrate [that] the rise of China has already had powerful effects on the structures of international political and economic life.'³⁸ As we reflect on the past fifteen years of STAIR, it seems timely to return to this theme, particularly in light of recent geopolitical shifts.

But China's status in 2020, when contrasted with 2011, has reinforced the powerful effects of China's rise in many ways, particularly in ways the contributing authors, and their five articles in STAIR's 6.2 edition theme section could not have anticipated. Since their publication, China has undergone a major leadership shift, with President Xi Jinping taking steps to alter China's domestic structure and standing in the world, dramatically. China has launched major grand strategic programs such as the Belt and Road Initiative,³⁹ challenged global norms by launching a broad effort to cleanse the Xinjiang region of ethnic Uighurs,⁴⁰ and adopted an aggressive approach towards its maritime neighbours in the South China Sea and its continental neighbours, particularly India.⁴¹

And of course, it is impossible to talk about China's role in the world in 2020 and not address the ongoing COVID-19 pandemic, which by all accounts began in Wuhan, China, and has spread to virtually every country in the world. China's early behaviour and its reluctance to share information which could have mitigated the virus's spread, have perhaps most directly brought into question China's effect on how business and politics are conducted on the global stage.

In reviewing this edition of STAIR and tracing the hypotheses, observations, and ideas put forth by the authors to the present, several new insights come to the fore. The first article by John Wagner Givens argued that 'rhetoric about China's foreign influence is so confused and that criticism of it so frenzied precisely because of China's relative indifference, rather than outright hostility, to norms of liberal democracy and human rights'.⁴² He goes on to point out that:

China does not observe these norms at home or promote them abroad, but neither does it attempt to undermine or supplant them. Instead, China primarily seeks to pursue its economic interests, especially in terms of securing access to natural resources and to gain recognition as a world power.⁴³

However, the years since Givens's article have both supported and challenged his hypothesis. Since 2011, China has graduated from simple indifference to norms of liberal democracy and human rights,

both at home and abroad. China's attempts to commit ethnic cleansing of the Uighurs in Xinjiang province have certainly demonstrated how Chinese behaviour can no longer be claimed to be simply not actively observing these norms. Moreover, China has looked to export its method and its model of cleansing or re-educating these Uighurs around the world, spreading its mass surveillance and social credit score system – used in an Orwellian fashion to destroy Uighur culture and heritage – to others around the world.⁴⁴ While scholars writing on world order agree broadly with Givens on his claim that China has not shown a history of supplanting global norms on human rights, it is clear that China is challenging them now, more than ever.

In the second piece for this theme section, Tom Rafferty looked at Chinese development activities in Africa, arguing that China's approach to the development regime needs to be seen as more than simply an 'amoral counterpoint to the humanitarian West'.⁴⁵ He argues instead that China's position is shaped by its own developmental experiences and that 'it is the latter that moulds its aid policy rather than a wish to undermine the West for geostrategic reasons'.⁴⁶ Here, recent developments allow us to see how Rafferty's hypothesis has panned out too.

The most direct change since the publication of Rafferty's piece has been the development of China's Belt and Road Initiative. As part of the initiative, Chinese behaviour has certainly validated Rafferty's observation that China 'offer[s] unconditional loans', arguably 'undermin[ing] the progressive agenda of established donors in Africa, which conditionally ties credit to improvements in governance and transparency'.⁴⁷ China continues to provide opaque, unsustainable loans with no conditions, leading to ballooning debt in several African countries.⁴⁸ And while Rafferty rightly pointed out overhyped concerns about overreaching Chinese behaviour, recent moves such as trading debt for long-term leases or ownership of assets such as ports, suggest how concerns about China seeking a foothold in Africa as part of its grand strategy cannot yet be ruled out.

In the third article, Rosemary Foot examined China's contribution to the UN's humanitarian work, as well as its position within the debate over the Responsibility to Protect (R2P) doctrine. She concludes that 'China has not obstructed the development of this concept [...] Yet it is significant that China has chiefly emphasised the capacity-building functions of the R2P mandate, as well as strongly supporting attempts to ensure the concept's limited application and differentiation from humanitarian intervention'.⁴⁹

However, while China's support for R2P has helped its adoption within the UN, China has not been shy in blocking its invocation, particularly in cases where it has a geopolitical interest. This is not to say that China alone is responsible for the comatose state of R2P today. World powers have collectively failed to live up to the standards they set

for themselves, especially in failing to act on humanitarian grounds in Syria. However, China's actions, particularly in blocking humanitarian action against its ally, Myanmar, where the Rohingya crisis continues to simmer, need to be considered in the context of its commitment to R2P.

In the final two pieces, Tong Zhao and Shashank Joshi discussed topics very much in geopolitical flux today. Zhao examines 'the influence of China on the direction of international standards on nuclear weapons and other nuclear technology', arguing that 'China will continue to be involved in important ways in the nuclear regime, and moreover that China's involvement will likely be transformative for the regime as a whole'.⁵⁰ However, there is no denying that nuclear politics and the global nuclear regime has become a part of the broader 'great power competition' underway between the US and China. Indeed, the US withdrawal from the Intermediate-Range Nuclear Forces Treaty in 2019 was linked directly to China, with the Trump administration claiming that China's build-up in the Pacific Ocean means that the US cannot remain committed to the treaty.⁵¹ What comes next for this treaty is unclear, but Zhao's piece provides a detailed perspective into Chinese engagement with the global nuclear regime. In the final article of STAIR's 6.2 edition, Shashank Joshi looked at India-China relations, arguing that 'a modest, but observable and important, rise in enmity has occurred over the recent period, reversing the secular trend that has prevailed since the 1980s'. He went on to raise the question of 'whether bilateral enmity also makes it harder for the two states to co-operate in sustaining regimes and, more broadly, providing public goods'.⁵²

That rise in enmity continues today. As of writing, India and China are standing off along the Line of Actual Control, the disputed border between the two countries, echoing an earlier stand-off between the two at Doklam in 2017. In addition to military standoffs, economic concerns, such as Indian allegations of Chinese unfair trade practices towards India, as well as broader strategic considerations, such as Chinese concerns of India's efforts to join a coalition of US allies to contain it, continue to dominate the relationship. Joshi's question on how such rising enmity affects the world order and the provision of public goods, therefore, remains an open question.

Looking back at the second edition of the sixth volume of STAIR, has raised new questions, ideas, and insights about *China's Rise and Adapting Global Structures*. Blagden, Hempson-Jones, and van der Horst should be commended for their foresight on selecting this topic, as well as the breadth of articles their Theme Section contained. Overall, their edition fits with the best traditions of STAIR, contributing a premier student-run journal that engages with the most significant topics in international affairs.

In exploring how STAIR has covered these four diverse themes, from cybersecurity to decolonising knowledge, international cooperation, and China's rise, we have drawn on editions and contributions taken from across the first fifteen years of our journal. Throughout this time, STAIR has covered an astonishing variety of topics, relying on writers from many disciplines and across a broad range of backgrounds to produce insightful and prescient analyses of international issues. In the future, STAIR will continue this proud tradition by critically engaging with the biggest challenges, debates and opportunities which will define and shape our world.

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45 Tom Rafferty, "China and Africa: Implications for the International Development Regime," *St Antony's International Review* 6, no. 2 (2011): 29.

46 Blagden et al., "Editorial Introduction," 5.

47 Rafferty, "China and Africa," 29.

48 John Hurley, Scott Morris, and Gailyn Portelance, "Examining the Debt Implications of the Belt and Road Initiative from a Policy Perspective," *Center for Global Development Policy Paper* 121 (2018): 2, <https://www.cgdev.org/publication/examining-debt-implications-belt-and-roadinitiative-policy-perspective>

49 Rosemary Foot, "The Responsibility to Protect (R2P) and its Evolution: Beijing's Influence on Norm Creation in Humanitarian Areas," *St Antony's International Review* 6, no. 2 (2011): 48-49.

50 Tong Zhao, "China's Role in Reshaping the Global Nuclear Non-Proliferation Regime," *St Antony's International Review* 6, no. 2 (2011): 67.

51 David E. Sanger and Edward Wong, "U.S. Ends Cold War Missile Treaty, With Aim of Countering China," *The New York Times*, 1 August 2019, accessed 8 July 2020: <https://www.nytimes.com/2019/08/01/world/asia/inf-missile-treaty.html>

52 Shashank Joshi, "China, India, and the 'Whole Set-Up and Balance of the World,'" *St Antony's International Review* 6, no. 2 (2011): 85.

Editorial Introduction

Finn Klebe

Before introducing the thought-provoking and high-quality book reviews included in the 16.1 issue, I wanted to use this space to express my utmost gratitude to everyone who contributed to STAIR over the past few months. You have managed to dedicate hours and days to producing high-quality work under the most trying circumstances, with a global pandemic turning our lives upside down. Thank you!

Thanks to this extraordinary effort, what you as a reader can see in this book review section is a great array of recent publications that are discussing pertinent issues within the realm of gender and International Relations. How do gender norms play out between women across the North-South divide? How did the #MeToo movement look from the inside? What motivates women to join a repressive political regime like ISIS? And how is gender perceived and conceptualised around the world? To all of these questions, you will be able to find answers in the reviewed publications of this issue. Additionally, our reviewers have succeeded at contextualising and evaluating all of the contributions these publications make, and they offer additional food for thought with their own reflections. Before having a look at the reviews yourself, I will quickly outline each of our contributions below.

Augusta Nannerini, PhD student at the Graduate Institute of Geneva, reviewed the book 'Complicit Sisters: Gender and Women's Issues across North-South Divides'. The author, Sara de Jong, interviewed women working for non-governmental organisations in the Global North for this volume. Importantly, these women are active in working with migrants or organisations that work with women-led entities in the Global South. In looking at the role the women in the Global North play vis-à-vis their counterparts in the Global South, de Jong problematises structural inequalities driven by post-colonial narratives that are underwriting the relationship between the women across the North-South divide. Nannerini considers this book as having succeeded in blending several disciplines through the overarching lens of gender, ranging from the study of development work in International Relations, to intersectionality in feminist studies. Despite this highly innovative approach, Nannerini would have appreciated some additional contextual information on the interview subject in order to embed them better within the narratives the author chooses. In any case, both Nannerini's critical evaluation of the book, and the author's approach itself, certainly create an incentive to give 'Complicit Sisters' a read.

The review by Professor Caron Gentry, who is based at the

University of St Andrews, concerns the book, ‘#MeToo and the Politics of Social Change’ by Bianca Fileborn and Rachel Loney-Howes. The different chapters in this edited volume look at the forms of violence the movement went against, the different contexts (beyond Hollywood) in which it played a role, and the changing characters that were driving the movement. In her review, Gentry emphasises the volume’s value as a great in-depth analysis of the #MeToo movement with the potential to enrich students’ understandings of which issue areas social movements include and exclude, and how power dynamics among the movement members might change the outlook of the movement itself. Generally, Gentry’s evaluation of the book embeds the volume well in its field of literature, while highlighting the unique contributions this volume is able to make. In the end, Gentry’s review presents ‘#MeToo and the Politics of Social Change’ as a great entry point to a more holistic understanding of the dynamics of this particular social movement.

Dr Fenneke Reysoo, who is a senior lecturer at the Gender Centre at the Graduate Institute in Geneva, reviewed the much acclaimed ‘Guest House for Young Widows: Among the Women of ISIS’ by Iranian-American journalist, Azadeh Moaveni. In this book, Moaveni takes on the challenge of giving a voice to the voiceless in the ISIS caliphate - namely women. The author tells the life story of thirteen women through extensive interviewing and background research, catering to a more holistic understanding concerning the circumstances in which women from abroad were inspired to join ISIS. In her review, Dr Reysoo welcomes this unique analytical angle, especially because it leaves women with their agency and avoids jumping to blanket-statements about women’s motivations too quickly. Additionally, the reviewer commends Moaveni’s contextualisation of the women’s life stories within the socio-political and religious circumstances they find themselves in. Overall, both the descriptive and meticulous analytical work of the reviewer further illuminate the value and uniqueness of Moaveni’s book, rendering it a highly important volume in the gender debate within repressive political systems.

Last but not least, Taylor McDonald, a PhD candidate in the Political Science Department at the University of Florida, has reviewed the edited volume on ‘Sexuality and Translation in World Politics’ by Cottet and Picq. The different chapters in this volume show the importance of contextualising the different concepts of gender and sexuality concerning their intellectual and geographic origins. McDonald, in reviewing this book, appreciates this approach as it gives further attention to world regions that are often left out of the gender debate and underappreciated within the field of International Relations at large. The review certainly emphasises how important this more holistic discussion of gender norms is, thus opening up further analytical avenues to be explored in the study of gender, sexuality, and their manifestations in regional languages.

To end on a more recent note, the discussion of gender has become especially prevalent during the time of the COVID-19 pandemic. Are we taking steps back in the emancipation of women as part of the labour force? Are the caring responsibilities of women for families and their concomitant duties in their home office equally valued? Certainly, these questions show that the contributions to this STAIR volume can only be the starting point to a much more eclectic discussion of gender in varying political contexts. Nonetheless, I am certain that the breadth of issues covered and reflected upon by our authors has already paved the way for further enriching and scrupulous enquiry into some of the most pertinent questions of our time. Finally, I hope you as a reader will be as intrigued by the contributions to this issue as we were at STAIR when assembling this section.

Sara De Jong, *Complicit Sisters: Gender and Women's Issues Across North-South Divides*, Oxford University Press, 2017.

Augusta Nannerini
Graduate Institute of Geneva

In this research, the author critically analyses twenty interviews conducted with women working in non-governmental organisations in European capitals that engage with either migrant women in Europe, or with women-led organisations in the South. De Jong's main argument is that the influence of structural inequalities and unequal power relations between Northern and Southern countries create biases in the relationship between the women from the Global North and their 'sisters' from the Global South.

Throughout this work, the reader learns that there are several levels of analysis and different meanings of the notion 'complicit sisters', after which the book is named. First, the interviewees experienced their gender as a common denominator that connected them to the women from the South. Women from the North and from the South are 'complicit' in fighting for gender equality. This is translated into a perception of sisterhood that is described by the author as a process based on shared solidarity and admiration for the same role models that energise and drive feminist workers. This is an original understanding of 'sisterhood', different from other feminist analyses that take the sense of shared victimhood created by worldwide discrimination against women as the common ground able to unify women's experiences. Second, the author explains that while women working in the North acknowledge that they are privileged because they have been offered more opportunities to study and develop professionally, they do not see that these privileges are a consequence of the systemic inequalities embedded in the structure of North-South relations. According to the author, the decision to become active and work with issues related to gender equality should not be seen as a part of a 'giving back' mechanism that occurs following the grateful recognition of the good opportunities that one has happened to have in life due to good fortune. She argues that having more opportunities is not a question of luck. Instead, privileges are the manifestation of global structural inequalities. By failing to recognise their role within this structure and by participating in the performance of its practical dynamics and discursive rhetoric, women from the North are unconsciously complicit in it.

To explain the feminist perspective of her analysis, in Chapter Two the author offers an overview of the developments of the feminist political movement and literature, touching upon the most controversial

themes currently inflaming debates among feminist activists. She engages with the critiques raised by black feminist scholars against mainstream feminist movements and explains how their arguments are still valid in current times. She claims that the feminist women that she interviewed agreed on the points raised by black feminists in the past, but while trying to be self-aware of their position of privilege, they dismissed the possibility of being influenced by post-colonial heritages. The author reflects on the professionalisation of feminist activism, capturing the nuances of the internal dilemmas of the women who made a career out of their passion. These are articulated within the dialectic between personal interests for career development and the ones shared in the common feminist cause. Issues related to where one should draw the line between engaging with gender matters at work and outside the office are also examples of the thematics raised in this part of the analysis. Amid these challenging and somewhat ethically disturbing questions, the author proposes a solution to the tensions that arise between personal goals versus shared commitments for the common cause by explaining that there can be a coexistence of the several aspects and interests that interplay in the careers and personal beliefs of the women interviewed.

The focus on women working in the North allows the author to reflect on the issue of 'distance' experienced by the interviewees: distance from the beneficiaries and the partners of their projects, as well as distance from other colleagues working in the field. In this sense, the book intertwines reflections on feminist activism and professional work with the literature about development actors more broadly, also connecting it to the dynamics occurring between headquarters versus field officers. Building on her analysis of the professional careers of women and the interlace and influence of their feminist principles on their work, the author manages to identify the linkages existing between issues of sex, race, and social class. By doing so, she engages and contributes to the academic literature that analysed these issues in the context of the study of the professions of aid and development workers, providing it with additional insights coming from her 'feminist lenses'. Her use of the feminist notion of 'intersectionality' sheds lights on the complexity of understanding the Self and its relation with the Other. The author shows that ideas such as 'cultural difference', applied to explain behaviours of the Othered women from the South in relation to their gender, acts as a device that obscures the personal biases held by the women from the North in relation to their sisters from the South. In reflecting upon their efforts and role within their activities to enhance gender equality globally, the women from the North embrace a 'race to innocence' aiming to justify their actions, which prevents them from acknowledging the broader context of the structural inequalities in which their work is embedded. On the one hand, by interacting with non-feminist post-colonialist scholarship, the author is able to contextualise

her own inquiry into a broader set of questions extensively explored in international relations (IR) literature. On the other hand, her gender approach subtly makes a statement to reclaim the added value of the feminist perspective to analyse these issues of development and aid professions.

A weakness of the book is in the static and disconnected structure in which the interviews with the women are presented. In the introduction of her work, when talking about her methodology, the author explains that it is not expected that the reader remembers the name and general profile of each interviewee and is able to reconnect the abstracts of interviews presented in the chapters to the individuals that related them. As a result, the different parts of the identities of these complicit sisters are presented as monadic representations of individual characteristics and are not described as interlaced and complex phenomena. One consequence of this methodological choice is that that each chapter of the book can almost be read independently from the others. However, this advantage comes at the expenses of a more holistic approach based on homogenous structure and connections among both the different pieces of the interviews and of the biographies of the interviewees. As a result of this methodological choice from the author, the reader gets the impression that chunks of interviews are arbitrarily chosen and used to support the author's argument in each of the chapters. A clearer picture of the context and specific circumstances, such as interviewees' age, nationality, and educational background would have had added layers of complexity to each statement reported in the analysis. This kind of information is provided by the author's interpretation and analysis of the interviews only occasionally, when she arbitrarily considers it appropriate. The author leaves other parts of the interviews' abstracts rather isolated, lacking reference to the broader context. These pieces are therefore impoverished of the richer significance that they could have potentially acquired, had they been related to the individual characteristics of the speakers. While this effort would have had the disadvantage of increasing the length of the book overall, it would have strengthened the validity of its thesis. Additionally, it would have relieved the author part of the responsibility of cherry-picking the parts in which the reader deserves more information about the interviewees, creating room for personal reflection and, eventually critical engagement with the author's own analysis of the abstracts of discourses reported in her chapters.

With its argumentation surrounding the issues associated with the professionalisation of feminist work and the dialogue established between feminist scholarship and other fields of research in IR, this book is an example of the fruitful contributions the gender lens brings to different fields of research. The book critically reflects on the paradoxes present in the work of women in the North who want to *do good*, but who

are misguided about how to *do it right*. The fact that the self-awareness of the women interviewed does not reach the level of depth required to identify the structural dynamics at the root of social inequalities (with which gender discriminations are intertwined) validates de Jong's call for a substantial change in the performance of 'complicit' sisterhood. By doing so, the book paves the way for further research on the possible ways to theorise about this issue and invites professionals and activists to start a pragmatic shift in their way of carrying out their work.

Bianca Fileborn & Rachel Loney-Howes, eds.
#MeToo and the Politics of Social Change. Palgrave
 Macmillan: Cham, Switzerland, 2019.

Caron E. Gentry
 University of St Andrews

#MeToo and the Politics of Social Change is a timely edited volume on the rise of the global #MeToo movement in 2017. Although 'Me Too' was originally coined by Tarana Burke in 2006 to raise awareness about sexual violence against black girls and women, the phrase rose meteorically in 2017 when American actress Alyssa Milano tweeted it to call out the endemic social ill of sexual violence. From there, the use of the phrase skyrocketed, creating a global conversation about the level and styles of sexual violence women face in their daily lives. It is also largely associated with a challenge to the Hollywood elite and the use of sexual harassment, violence, and intimidation against actresses, leading to the 'Time's Up' moment during Hollywood's 2018 awards season. As a collection written from an intersectional perspective, *#MeToo* brings its readers into the life of a new social movement, looking at not just how the hashtag proliferated but also who gets to use the phrase and what type of violence is covered by it.

If new social movements converge around issues of identity, culture, and social issues,¹ then there is no reason to deny #MeToo as a social movement—one fomented in the digital age. Coalescing around a particular ideology, *#MeToo* claims some form of popular feminism and anti-misogyny, and the use of it went global: 'French women used the #BalanceTonPorc ("name your pig") hashtags; &RiceBunny was used in China; Italian actress Asia Argento tweeted #QuellaVoltaChe ("that time when...")...; and Spanish women joined in using the hashtag #YoTambien' (p. 3). The editors and the contributors place this movement within a larger and more historical movement against sexual violence—one that is fractured and less cohesive than one might think. In that light, New Social Movement theory is particularly interested in how ideology is used to bring people into a movement, leading to some form of collective action. In a digital social movement, the expression of solidarity—here, the shared vulnerability of those tweeting that they too are survivors of sexual violence, is what creates the collective action (see the chapters by Kaitlyn Mendes and Jessica Ringrose, and Jessamy Gleeson and Brennan Turner). More so, New Social Movement theory has long been interested in erasures and of what does not get noticed.² This is what *#MeToo and the Politics of Social Change* and its variety of chapters is able to bring to life: inclusions and exclusions within a popular movement.

The editors are clear in their introduction to the book:

The development and circulation of #MeToo brought to a head a series of questions regarding *who* is able to speak and be heard, *what* constitutes sexual violence, *whose* experiences are included and perceived as worthy of redress, and *how* activist communities should go about the “business” of generating change (p. 5).

Thus, there is something inherently intersectional about the collection, even if intersectionality is not explicitly addressed until Rachel Lang’s chapter, ‘This Black Body Is Not Yours for the Taking’. Nevertheless, the underlying heart of intersectionality is embraced, looking to see how harm may come to a woman based upon her gender, sexuality, race, and socioeconomic status in a combination of these, or other factors.³

Therefore, the twenty-one different chapters cover a variety of issues, and the book is subdivided into four sections covering the politics of speaking out and consciousness-raising, whose bodies matter more, the entertainment industry and media reporting, and ethics and the future of anti-sexual violence activism. The beauty of the collection is that students can be assigned different chapters, but the lecturer can feel certain each chapter will cover the basics of #MeToo and at least some of the tensions within it. Each chapter is theorised, yet, given the number of chapters and the brevity of each, the theory is not explored in depth. While this means that each chapter is therefore accessible to students of all levels, there are places in which a reader may want, or expect, deeper connections to be made. Additionally, the book is an exhaustive account of #MeToo and yet, potentially exhausting in the amount of repetition between chapters. Even though there is a substantial introduction to the book and to the movement, individual chapters repeatedly address how Tarana Burke was overshadowed by white Hollywood actresses. Of course, this needs to be pointed out in an intersectional feminist text, but not necessarily in numerous chapters.

There are still unique and very important contributions made by the volume, particularly in who was *not* seen in #MeToo and what violence was seen as less than legitimate. Thus, it is also an interrogation of how gender structures work and how they are reproduced by social, print, and visual media in different ways. The intervention made by Jess Ison’s chapter for queer folk is particularly salient and unique, which adds to the discussion of how movements tend to erase difference of experience in both levels of violence but also in those who are allowed to speak out about this violence. Additionally, the majority of the contributors are Antipodean, which sheds light on a part of the Anglophone world that is often not given much attention. Therefore, its intersectional inclusion stretches beyond women of colour in the United States, like Tarana Burke or those leading Black Lives Matter, in order to incorporate the voices

and experiences of Aboriginal and Torres Strait Islander women. The volume also addresses how women in other parts of the world adapted #MeToo to their cultures (in particular, see the chapters of Part II).

This collection is an important, in-depth snapshot of a particularly salient moment in the fight against—and in awareness raising for—sexual violence. While this fight will continue for a number of years to come and will move past the Me Too and Time's Up moments, #MeToo will be, nonetheless, a touchstone for a long time and something worth revisiting in the future. Therefore, this collection will stand as an academic text within that revisiting.

Notes

- 1 Donatella della Porta and Mario Diani, *Social Movements: An Introduction*. (Blackwell Publishers: Oxford, 1999).
- 2 Margaret Denton Hastings, "Theoretical Perspectives on Social Movement," *New Zealand Sociology* 13, no.2 (1998).
- 3 The Combahee River Collective, "The Combahee River Collective Statement," (1977), accessed November 21, 2018, https://americanstudies.yale.edu/sites/default/files/files/Keyword%20Coalition_Readings.pdf; Kimberlé Williams Crenshaw, "Demarginalising the Intersection of Race and Sex: A Black Feminist Critique of Antidiscrimination Doctrine, Feminist Theory, and Antiracist Politics," *University of Chicago Legal Forum* 1 (1989): 139-167.

Azadeh Moaveni, *Guest House for Young Widows: Among the Women of ISIS*. New York, NY: Penguin Random House, 2019.

Fenneke Reysoo
Graduate Institute of Geneva

In this thought-provoking book, Iranian journalist Azadeh Moaveni takes us through the life stories of thirteen young women from different countries (Tunisia, Syria, Turkey, Great Britain, and Germany), each of whom has shaped her Muslimness in her own way during the turbulent past two decades. Moaveni interweaves these individual life stories with the political and social developments of the Middle East and North Africa and characterises her project as ‘immersive reporting’ with a mission to give a voice to the young women themselves.

The book was prompted by the widespread incomprehension in Western Europe and the United States as to why young, reasonably-educated women gave up their lives in free, democratic, woman-friendly societies to travel to the ISIS Caliphate. The stories provide insights into the motivations and actions of these women. Instead of talking *about* young Muslim women, the book allows them to speak for themselves. It thus revolutionises the common representation in Western media of Muslim women who join ISIS as victims of sophisticated propaganda without agency and autonomous decision-making capabilities.

In addition to the interviews, Moaveni also uses other sources to place the women’s stories into a broader political and social context, including mobile phone photo albums and text messages. Readers empathise easily with the women—their dreams, their dashing adolescent desires to act, their first budding feelings of love for young men who gave them recognition and promised them a meaningful future. Details about local living conditions, whether in Tunisia and Syria before the Arab Spring, or in Britain and Germany, contextualise their decisions. For example, the issue of wearing the *hijab* or *niqab* in Tunisia—officially banned in schools and universities since 1981—is, for twelve-year-old Nour, an act of resistance to ‘the Ben Ali-era controls over the religious sphere’ (p. 224); she claims recognition as a full citizen. Therefore, the choice of young girls to cover their heads is much more than a symbol of passivity and the oppression of women. Moaveni shows that the meaning of the headscarf—and other clothing covering body and face—in North Africa and Western Europe cannot be separated from the history of colonisation, independence, the search for national identity, and postcolonial developments including migration to the (former) metropolises.

It may seem trivial to focus once more, as Moaveni extensively

does, on the headscarf when it comes to understanding women in the Middle East. The strength of Moaveni's approach, however, is that she uses this theme to capture the broader historical and geopolitical determinants of the daily lives of youth in the Middle East, North Africa, and Europe. The stories bear witness to the painstaking integration process of second-generation migrants, such as Turks in Germany, or Pakistanis, Bangladeshis, and Indians in Great Britain. Problems such as a lack of access to jobs, poor working conditions (petty jobs, long working hours, and low salaries), unemployment, and poverty are presented. In addition, housing conditions in deprived neighbourhoods, social problems related to drugs and violence, bleak future prospects, and inevitably broken families and domestic violence are also part of daily life. Failed integration is more strongly linked to socio-economic inequalities than to Islam.

How can these teenagers, both boys and girls, delineate a path to a meaningful future and find guidance under these circumstances? Girls are monitored more closely, and social control is more encompassing and intrusive. Although they generally perform well in school, they derive social recognition primarily from their future roles of wife and mother. More homebound than their brothers, they are sensitive to trends on social media and exposed to propaganda in their search for cultural identification. Meanwhile, the increasingly Islamophobic environments they live in instil feelings of exclusion and alienation and drive the quest for Muslimness. For example, 'Amira's nascent understanding of how local Islamophobia as a form of anti-Muslim racism connected with global politics was intertwined with a new, assertive embrace of Muslim identity' (p. 151).

Given this quest, and in these underprivileged conditions, it is not surprising that ISIS's project to build an Islamic state was appealing. Defenders of the Islamic State, using a sophisticated propaganda machine, promised a just society governed by Islamic law in which both women and men had an important role to play. Young Muslims were searching for a meaningful life and social identity, not only in Europe but also in countries such as Tunisia, Turkey, Iraq, and Egypt, amongst others. The mobilisation of their Muslimness was fuelled by the humiliations Muslims experienced in countries harassed by Western powers, such as in Afghanistan, Iraq, Syria, and Libya—always against the backdrop of the Palestinian question. From these countries, too, young people flocked in droves to the Caliphate of Abu-Bakr between 2013 and 2017.

The book documents the radicalisation processes of her protagonists and their easy crossings to Syria via Turkey. Moaveni takes us through the stories of the young women to Raqqa, Syria and Tal Afar, Iraq and the realities of everyday life in the Caliphate. Wartime life turns out to be a very different reality from the dream of self-realisation as a Muslim in an Islamic state (p. 169). Many women lost their husbands in

the fight and ended up in widow shelters—hence the title of the book—soon to be married off again, because a single woman had no right to exist. Without the protection of a husband, their lives became insecure in the Islamic state.

Through the eyes of these young women, we become aware of the complex constellation of war in Syria and Iraq, where international actors such as Iran, Russia, the USA, Turkey, and various Syrian, Kurdish, and Iraqi forces/militias fight each other. Eventually, the Caliphate, which at its peak covered a territory the size of Great Britain, loses ground. Tired of violence, wracked by grief at the loss of their husbands and sometimes children, the young women are desperate to flee the conflict area.

Unfortunately, the plight of these women after the ‘end’ of the Caliphate is mostly a blind spot in both Western media and international politics. Many women languish in camps, detention centres, or prisons. No one seems to care about them anymore, notwithstanding the fact that ‘courts in Baghdad began sentencing many of the foreign women to death’ (p. 322). The sole mobilisation was by families who gave humanitarian reasons to save innocent grandchildren. Moaveni wonders: ‘What could you say about a world where your baby grandson was kept for months on end in prison, because bureaucrats wanted to punish families for the path their children had taken?’ (p. 262). The young women who joined ISIS are suspected of participating in terrorist organisations and/or acts of terrorism by governments that ‘play kiss-ass with Saudi businessmen’ (p. 265). In addition, among counterterrorism experts, ‘... there was little eagerness to truly understand *why* they had gone’ (p. 267). The book urges us to wonder: who are the perpetrators of terror, and who are the terrorists? It is, therefore, a must-read.

One critical comment, however, has to be made. In the ‘Note to the reader’ (p. 333), Moaveni confesses that she herself is absent from the narrative (p. 334), that her Iranian background did not interfere (p. 335), and that the ‘fact [*sic*] stands starkly in its own truth’ (p. 335). As a feminist critical scholar convinced by the socially constructed character of society and inspired by standpoint epistemology, I was taken aback by this value-free and positivist framing. The book could not have been as it is without Moaveni’s cultural background as an Iranian woman. Her well-informed insider knowledge of the region, and her empathy and understanding of the humiliations that people in the region have endured for a long time, adds to the book’s depth and nuances. In this respect, the book is what Foucault calls a ‘counter-memory’ and an excellent, consciously partial contribution to understanding from within why young women joined ISIS.

Subsequently, Moaveni’s statement that ‘judgment remains the prerogative of the reader’ (p. 335) is problematic. I argue that such a positioning achieves the unintended outcome of reproducing stereotypes that she wants to debunk. By leaving the judgment to the readers, the

text gets a life of its own beyond the control of the author. The proof is the concise summary on the cover. It focuses on the *victimhood* of the women by stating: '*they were recruited, inspired, or compelled to join militants*', they '*fell prey to sophisticated propaganda*', the men that lured them into ISIS happened to be '*violent criminals more obsessed with power than with the tenets of Islam*', and '*women of ISIS were stripped of any agency*'. Penguin House is thus reproducing an Orientalist stereotype that Moaveni has tried to deconstruct.

Such commercial strategies, similar to the sensational media attention given to my nuanced 1998 biography of a Moroccan migrant in the Netherlands, who was kidnapped by her father,¹ are dangerous. The relentless reproduction of the image of an oppressive essentialised Islam merely contributes to polarisation and hostility. Fortunately, Moaveni did not do that in her text, but she could have conveyed this more explicitly in the note to the readers, and above all, to the publisher.

Notes

1 Reysoo, Fenneke, and Karima Ouchan, *Karima. Nooitgeschreven brief aan mijn vader* [*Karima. Never written letter to my father*] (Amsterdam: Bulaag, 1998).

Caroline Cottet and Manuela Lavinas Picq,
eds. *Sexuality and Translation in World Politics*.
E-International Relations Press, 2019.

Taylor R. McDonald
University of Florida

I identify myself in language, but only by losing myself
in it like an object.¹

Jacques Lacan's famous assertion anticipates the central concern addressed in Caroline Cottet and Manuela Lavinas Picq's edited volume: in order to garner legal recognition and protections, non-Western sexual rights seeking actors too often must appeal to the global sexual rights regime that identifies and categorises diverse sexualities into familiar Western frameworks of LGBT politics. In being brought to international attention, the uniqueness of non-Western sexualities is lost when subsumed under globalising Western narratives. The myriad of ways in which global narratives are locally embraced, resisted, and adapted animates contributions to this volume, as do these scholars' practical proposals for enhancing the human rights of individuals in their given case studies. *Sexuality and Translation in World Politics* employs queer literatures and explores cases the lay reader is likely to be less familiar with, exploring the politics of sexuality in areas as diverse as Tajikistan, Nepal, and the Brazilian Amazon. Yet, in keeping central a solutions-based approach, these chapters succeed in presenting readers with a welcomed range of compact overviews of each historical and contemporary political landscape and strike the right balance between theoretically-informed criticism and problem-solving 'ways forward' that neatly tie together the local and global. Those new to exploring their queer intellectual curiosity will find the thought-provoking insights of *Sexuality and Translation in World Politics* accessible and incredibly relevant.² As with all texts that offer solutions to political problems, this volume also invigorates debate regarding how fruitful the proposed 'ways forward' will prove.

Rather than accepting the meaning of 'LGBT' and the community that this signifier refers to as fixed, the contributors use the politics of translation as a lens to critically analyse hegemonic knowledges of sexuality as they migrate beyond the West. Cottet and Picq open by asking, 'What are the implications of translating a political movement into a language that does not have the words to say it?'. Translation is taken to be a political act, as any attempt to make the meanings in one language realisable in another is always incomplete. Translation never produces a perfect reflection of meaning in the original text; it is a

rewriting and offers opportunities, whether consciously or unconsciously pursued by the translator, for political intervention, to adjust meanings or introduce new ways of thinking about subjects. Nor are translations multidirectional, as conceptual categories of sexualities have historically been exported from the Anglospheric core, rather than imported from the silent periphery.

The central finding among the chapters is that marginalised voices betray Western discourses of sexuality and identity. Picq and Jose Tikuna's chapter on Indigenous sexualities is particularly illuminating on this front. Chapter Four highlights how prevalent gender hybridity, fluidity, and recognition of third genders is amongst Indigenous peoples from the Zapotec of Mexico to the Ladakhis of the Himalayas. As an example, muxes, understood by Zapotec society as divinely blessed beings—biologically male but embodying a third gender that is neither male nor female—resists categorisation in Western notions of gender binaries or LGBT codifications. To categorise one as gay requires an assumption about sexual identity only possible with the invention of a narrative about what homosexuality means. Pre-colonial Zapotec language, however, does not contain gender distinctions. That indigenous peoples in Mexico saw muxes neither as heterosexual nor homosexual, but rather as something altogether different, is made invisible in placing indigenous sexualities in the category of LGBT.

Each case study is rich in description, though the most commendable and contentious element is the contributors' differing approaches to praxis. The editors remind us that 'translation can be the opportunity to undo a global term for local appropriation' in challenging established knowledges 'and defining new ways of belonging' beyond hegemonic categorisations (p. 5). How exactly this 'undoing' and 'defining' is best accomplished remains contested. Mohira Suyarkulova (Chapter Three) practices 'translation as activism', having translated iconic texts of feminist and queer studies from English to Kyrgyz, accessing the emancipatory power of translation in exposing a new audience to ideas about sexual rights that incorporate local understandings of sexuality. Jo Teut (Chapter Six), on the other hand, calls for educational activism in combating stigmas on asexual persons—those who do not experience sexual attraction, not merely the lack of attraction itself. Asexuality, historically deemed a sexual desire disorder, is assumed to be correctable through treatment, rather than recognised as a sexuality itself. Stigmatisations can, for Teut, be resisted by taking seriously the accounts of self-identifying asexual persons to spread awareness and combat harmful practices (p. 85). Ibtisam Ahmed (Chapter Eight) claims 'the clear need for decolonization' is 'the best way forward for legitimacy and safely advancing queer rights' in the case of Bangladesh. Ahmed traces the conceptual history of heteronormativity in Bangladesh to British rule of the 1850s, whereby all forms of same-sex attraction were

deemed ‘unnatural offenses’ and made illegal, a decision that continues to inform contemporary politics in Bangladesh today (p. 104). Only by reclaiming sexualities in their original, context-specific forms—that fit neither the binaries imposed under colonisation nor contemporary global LGBT frameworks—can the ‘systemic oppression of the colonial past truly be undone’ (p. 109).

Each ‘way forward’ is premised on sensitivity to and prioritisation of specific cultural-historical experiences and sexualities above global frameworks. While the volume is evident of valuable nuance gained from this approach, far less attention is given to what is potentially at risk. For one, unique local non-binary sexualities, like the Zapotec muxes or Bangladeshi hijra, do not align with internationally recognised categories of LGBT, yet recognition of their sexual rights and freedoms in their local context is often premised on their solidarity with the global sex rights movements. The hijra community had to rely on Eurocentric narratives of transgender activism, despite most hijra not identifying as trans but rather as a ‘third gender’, in order to warrant recognition from human rights organisations. Yet, Ahmed indicates a willingness to forgo alignment with procrustean global sexualities frameworks and corresponding protections in favour of context-sensitive grassroots movements, noting that ‘while international solidarity is important and Western allies can provide much-needed security, it is still vital for queer activism itself to be grounded in decolonization’ (p. 109)—a trade-off readers and sexual rights-seeking actors may be far less willing to accept.

Furthermore, *Sexuality and Translation in World Politics* fairly, but not unproblematically, complicates what many readers will see as the most familiar vehicle for human rights activism in the non-Western world: international development agencies and organisations. Karolina Kluczevska (Chapter Nine) cites the narrow scope of these typically American and European institutions, like the U.S. Agency for International Development (USAID), in non-Western regions, where mandating the unwavering acceptance of liberal norms, as part of their human rights projects, becomes ‘more so an outcome of Western imagination than any understanding of local realities’ (p. 122). In Tajikistan, Kluczevska stresses that disdain over foreign interference has resulted in local Tajiks’ apathy toward improving the rights of individuals these development agencies focus on. Her context-sensitive approach parses out the nuance international agencies too often miss: lack of sexual freedoms may be a product of a history of scepticism regarding foreign intervention that seeks to bring them about, rather than actual homophobia in Tajik society. This is an important distinction, and one that implores us to question the effectiveness of these agencies; yet the results remain the same: non-heterosexualities receive no legal protections. In one of the rare exceptions in this volume, Kluczevska does not offer an alternative

‘way forward’, but instead concludes that ‘to avoid causing more harm, donors should reconsider intervening in countries with complex social dynamics which they may not fully comprehend’ (p. 123). This stance does not preclude foreign intervention per se, but readers may be left wondering to what extent any individual or organization can reach a point of adequate comprehension of local dynamics—especially without first mastering the local language, given the imperfection of translation, whereby one worldview can never be perfectly conveyed in the language of another, a claim on which the volume is premised.

Sexuality and Translation in World Politics revels in challenging the familiar criticism of political research that takes the ‘linguistic turn’: is this not all just words? The lived consequences behind linguistic labelling are vibrantly displayed in a manner that contributes to intersecting international relations, queer, feminist, and postcolonial research streams inside and outside the field of political science. This volume should be most pertinent to those studying gender and international relations (IR). *Sexuality and Translation in World Politics* can be heralded as both demonstrating the utility of analytical insights from gender theories to the study of IR, and an acknowledgement of how gendered approaches to IR—and IR as a field more generally—have further to go. The volume powerfully demonstrates how interrogating the international begins with attuning our focus to the local, an insight long upheld by gender scholars (‘the personal is international’).³ Yet, the fact that this volume’s uniqueness comes from its inclusion of diverse voices and experiences from regions of the world too often ignored in the IR discipline, and rarely heard from in gender-based research, remains a tacit admission that more work is to be done to ensure that ‘the personal is international’ is more a practice than just a slogan. This is not to undercut the increasing amount of research into non-Western genders and sexualities that the entries in this very review bring to light. It is to say, however, that Cottet and Picq encourage readers to think of this expansion and inclusion as a process in its infancy rather than final stages.

Notes

1 Lacan, Jacques. *Ecrits*. Paris: Editions du Seuil. 1966.

2 Weber, Cynthia. *Queer International Relations: Sovereignty, Sexuality and the Will to Knowledge*. Oxford: Oxford University Press. 2016.

3 Enloe, Cynthia, *Bananas, Beaches and Bases: Making Feminist Sense of International Politics*. Berkeley: University of California Press. 1990.

