Analysing European gender equality policies abroad: A reflection on methodology

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Abstract
Can gender equality quality criteria developed for assessing EU internal policies be used unequivocally for evaluating EU external policies? Or might a methodological adaptation be necessary? To engage with this dilemma, the author evaluates the two-dimensional quality model of Krizsan and Lombardo and examines what a reorientation of the model would entail to better allow for the analysis of gender policy implemented outside of Europe. The author argues that to allow for an in-depth analysis of EU gender policy abroad, the model’s procedural criteria ‘empowerment of women’s rights advocates’ and ‘transformation with reference to the prevailing context’ need to be brought centre stage and mainstreamed throughout the research design. The author suggests doing this by explicitly involving the views of gender activists from the national context in the analysis and using their perspectives as a touchstone for the evaluation of quality. To examine the proposed methodological model’s suitability for analysing the quality of gender policies in EU external relations, this operationalization is applied to the case of EU–South African development cooperation. The article concludes that the inclusion of gender advocates’ perspectives is necessary to avoid stereotypical, paternalist and Eurocentric ideas about the meaning of gender equality abroad and allow for a contextually grounded reflexivity on the quality of gender policy. Finally, it is argued that it is the role of feminist research to enhance women’s capacity for self-determination methodologically and to hear the voices of national actors that might otherwise not be heard in EU external relations.

Keywords
Development policy, European Union, EU external policy, gender equality, methodology

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Assessing and understanding the quality of gender policies and mainstreaming have been the focus of a large body of gender and politics scholarship. Some works have focused on the content of gender equality policies, other works have emphasized the process leading to these policies, while others use a combined approach evaluating both content and process (Krizsan and Lombardo, 2013). In addition, gender and politics scholars coming from a discursive epistemological perspective have stressed that quality criteria for gender equality policies are open to contestation as they may vary and shift over space and time (Krizsan and Lombardo, 2013; Lombardo et al., 2009). All in all, over the last two decades, a body of work has been created that deals with the different aspects of qualitative gender policies and several substantive evaluation models have been developed and applied to gender policies from all over Europe. However this scholarship has focused largely on gender policies and mainstreaming within the European Union (EU). Gender policies and the mainstreaming of EU policies outside of Europe have not received much scholarly attention and it is only in the last few years that feminist scholars have turned their lens to gender equality in EU external policy (e.g. Allwood, 2013, 2015; Debusscher, 2010, 2014; Lister and Carbone, 2006; True, 2009; Van der Vleuten et al., 2014). In this context the question arises whether models developed for assessing quality in EU internal policies can be used without adaptation for assessing EU external relations. Can Europe-based researchers unequivocally apply models for evaluating internal EU gender policies’ quality to EU external policy? Or might an adaptation or reorientation of these models be needed?

To engage with this dilemma, I evaluate a recent quality assessment model, namely the two-dimensional quality model developed by Krizsan and Lombardo (2013). Methodologically, this model seems well-suited to research the quality of EU gender policies in a context outside of Europe, as it emphasizes that quality criteria are relative and recognizes the different meanings of ‘transformation’ across contexts. After zooming in on this model in the next section, I analyse whether and how Europe-based researchers can apply it to EU external policy, and examine what an adaptation or reorientation of the model would entail to better allow for the analysis of gender policy implemented outside of Europe. Next I apply this specific operationalization to the case of EU–South African development cooperation. In the discussion and conclusion I reflect on the proposed methodological model’s suitability, based on the data presented in this article.

**Analysing gender policies’ quality: The two-dimensional quality model**

The two-dimensional quality model engages with dimensions of both content and process. One dimension looks at substantive content criteria including genderedness, intersectionality and the structurally transformative focus of policies. The second dimension links quality to procedural aspects and evaluates the empowerment of women’s rights advocates as well as the degree of transformation with reference to the prevailing context (Krizsan and Lombardo, 2013).

The substantive content dimension of the two-dimensional quality model analyses the *genderedness* of policies. This implies examining the extent to which gender is approached...
as an aim in itself, and not ‘as a way of more effectively achieving existing policy goals’, such as economic growth or poverty reduction (Walby, 2005: 323). A more meta-level analysis of genderedness would mean looking into the broader visions of gender equality that underpin policies: which norms and ideologies lie behind policies? what is the ultimate aim of policies? what kind of society do we ideally want to live in? In this respect feminist literature typically distinguishes visions of equal treatment, difference and transformation (Verloo, 2005).

Feminist research has shown that gender policy which fails to incorporate an intersectional approach excludes people at points of intersections between inequalities such as race, class, sexuality and disability. The extent to which policies pay attention to these intersections and are therefore inclusive is thus a second important quality criterion.

The structurally transformative focus of policies refers to the extent to which policies aim to dismantle deeply rooted hierarchies, societal norms and practices within which inequalities are embedded and which systematically discriminate women. According to Krizsan and Lombardo such policies ‘reveal quality elements in terms of the depth of their understanding of the problem of inequality as rooted in social structures such as the organization of labour, intimacy and citizenship … and the long-term transformative potential this understanding has for changing them’ (2013: 83).

The second dimension of the model connects quality to procedural aspects. As regards the first procedural criterion, ‘empowerment of women’s rights advocates’, empirical research has indeed shown that policies developed with the participation of women’s organizations or in accordance with their agendas tend to be qualitatively better, insofar as they help frame policy in more transformative ways (e.g. Van der Vleuten et al., 2014). This is because the participation of external gender advocates increases the possibility that policy-makers become aware of their institution’s predetermined frames and goals, which may fail to match gender advocates’ analysis of problems and solutions ‘on the ground’ (Debusscher and Hulse, 2014). The second procedural criterion, ‘transformation with reference to the prevailing contextual legacies’, is a clear attempt to contextualize quality criteria as quality does not exist in a vacuum. Indeed, rather than attempting to pin quality down to a one-size-fits-all, quality needs to be understood in relation to the specific context, since ‘what is perceived as transformation may … vary across countries’ depending on the pre-existing historically shaped institutional and contextual setting, and ‘the given point of time in the process of gender policy development’ (Krizsan and Lombardo, 2013: 85).

Assessing the quality of EU gender policies abroad

Analysis of the gender dimension in EU external policy by EU-based researchers often relies on desk studies and/or on Eurocentric perspectives – including analysis of EU policy documents, interviews with EU bureaucrats or with Europe-based NGOs. Although valuable to establish whether ‘policy shifts have been made operational’ in a way that transformative ‘impact in the field’ may be expected (Holvoet, 2006: 9), such accounts provide only part of the story and can lack deeper insight into the daily realities of women and men and the historically shaped economic, political and social context of gender relations which affect the implementation of EU external policy. From this
perspective it seems crucial that an evaluative model explicitly and comprehensively takes these contextual realities into account. As transformative policies are only ever progressive in relation to their context and not all policies will be transformative in every context (Htun and Weldon, 2012), we need in-depth knowledge of the social, political and economic contexts in which policies are executed. Indeed, analysis of policy interventions from the outset and how they will affect women’s lives — that is without in-depth contextual knowledge — risks ‘prescribing the process of empowerment and thereby violating its essence, which is to enhance women’s capacity for self-determination’ (Kabeer, 1999: 462). As a consequence I propose to bring the two-dimensional quality model’s procedural criteria ‘empowerment of women’s rights advocates’ and ‘transformation with reference to the prevailing context’ to centre stage when analysing EU external policies. Indeed, the two procedural quality criteria become particularly pertinent in analysing the quality of gender policies in a context outside the EU. I argue that, to allow for an in-depth analysis of EU external policy, the procedural criteria not only need to be further developed, but also mainstreamed, and evaluated as part of the methodology itself. I suggest doing this by explicitly involving the views of gender activists from the national context in the analysis and using their perspectives as a touchstone to assess each of the designated quality criteria. When applying this principle to the case study of EU development cooperation with South Africa, this implies taking into account the perspectives of South African gender advocates to analyse EU external policy and thus bridging the process and content dimensions of quality in the operationalization of the method. I explicitly link EU external policy to the realities of South African gender advocates and use their perspectives — together with those of EU bureaucrats — to assess each of the process and content criteria. As the views of EU bureaucrats are often bound by the EU’s institutional culture and its predetermined goals, it is crucial to contrast these perspectives, not only with quality criteria set forward in feminist scholarship, but also with the ‘flesh and blood’ views of gender advocates from the specific setting.

Preferably, the selected gender advocates1 are drawn from autonomous feminist organizations, characterized ‘by their challenge of patriarchy’ and that they ‘share a gendered power analysis of women’s subordination and contest political, social, and other power arrangements of domination and subordination on the basis of gender’ (Beckwith, 2000: 437). An autonomous organization is ‘characterized by independent actions’, where feminist actors ‘organize on the basis of self-activity, set their own goals, and decide their own forms of organization and struggle’ (Htun and Weldon, 2012: 554). According to Htun and Weldon (2012) there are several reasons why autonomous feminist groups — as opposed to women organizing for other purposes — play a critical role in understanding, evaluating and analysing transformative policy. Most importantly, feminist organizations are the primary drivers of change because they challenge the established social order and develop an oppositional set of priorities that reflect their experiences and concerns as a group, which cannot be developed in more generally focused organizations or in settings where group concerns must be subordinated to other goals and imperatives. Indeed, large-scale empirical research has shown that autonomous feminist organizations ‘devoted to promoting women’s status and well-being, independently2 from political parties and other associations that do not have the status of women as their main concern’ are critical to produce an enduring impact on the
establishment of transformative policy through the institutionalization of feminist ideas (Htun and Weldon, 2012). Using this reoriented methodological model I contrast the frames of South African gender advocates from autonomous feminist organizations with those of EU policy-makers with regard to the content and process criteria to analyse the quality of gender mainstreaming in EU external policy. I analyse the extent to which their frames relate to each other, as well as how both actors perceive and evaluate each other’s role. In what follows I turn to the case of EU development cooperation with South Africa from 2007 to 2013. After a brief overview of the integration of gender in EU–South African development cooperation I apply the proposed model to the case and use the perspectives of major South African gender advocates to analyse EU development policy in South Africa on the content and procedural quality criteria: genderedness, intersectionality, the structurally transformative focus of policies, the empowerment of women’s rights advocates and the transformative potential with reference to the prevailing context.

The case: Assessing the quality of gender mainstreaming in EU–South African development cooperation

Development cooperation between the EU and South Africa for the period 2007–2013 focused on two main areas: ‘employment creation’ and ‘capacity development for service delivery and social cohesion’. The employment sector aimed to reduce unemployment and poverty levels and consisted of three parts. The first part, the ‘Employment Creation Support Programme’, was a sector budget support programme which assisted South Africa ‘to increase the number of quality jobs and create a better enabling environment for business and skills development’ (Delegation of the EU to the Republic of South Africa, 2014). One gender indicator on the employment of women in short-term community jobs had been outlined.

The second part consisted of a ‘Local Economic Development Programme’ and a ‘Sustainable Rural Development Programme’ in the Eastern Cape which aimed to reduce the number of households living below the poverty line by setting up factories and creating employment in poor areas with a high unemployment level and a low level of service delivery. The programmes did not include gender equality indicators or objectives.

The third part, the so-called ‘Risk Capital Facility’ (RCF), was aimed at providing job opportunities to ‘historically disadvantaged persons’ by investing in small and medium enterprises through a ‘Development Cooperation Bank’. One of the performance indicators was to generate 60,000 jobs of which a minimum 30% would be reserved for women. Additionally, there were targets for the ownership and management of the companies, such as a minimum of 25% black shareholders and a minimum of 30% female managers and shareholders.

The aim of the second sector, ‘Capacity Development for Service Delivery and Social Cohesion’, was to deliver ‘better services to all South Africans’, as this would ‘unlock the scarce and necessary skills crucial for both economic growth and sustainable development’ (European Commission, 2007a: 11). Its two main programmes provided support for primary education and primary health care. In the area of education, no gender indicators or objectives had been outlined, while in the health sector, ‘improved maternal and
child health’ was among the result areas. In addition, the health section had a ‘School Health Programme’ which included awareness raising in schools on topics such as sexual and reproductive health, protection against STDs, gender power relations (e.g. on consensual sex, gender-based violence, ‘sugar daddies’).

Notably, EU development cooperation with South Africa was distributed through sectoral budget support which encompasses the transfer of financial resources from the EU directly to the partner country’s National Treasury in support of a sector programme following the fulfilment of agreed conditions for payment. In addition the EU Delegation in South Africa provided support to civil society organizations, including women’s organizations, in the justice, health, youth, education, employment, research and human rights sectors.

**Genderedness**

EU aid to South Africa had a strong focus on ‘reduced poverty and inequality, mainly through economic growth’ (European Commission, 2007a: 21) and aimed to ‘create the right economic environment for achieving the MDGs [Millennium Development Goals]’ (European Commission, 2007b: 5). In accordance with this framework, solutions for gender inequality – jobs for women and maternal health – have been geared towards realizing the MDGs and focus on poverty reduction and achieving full employment (see also Debusscher and Hulse, 2014). Solutions for gender inequality were thus mainly framed instrumentally and gender equality as an aim in itself was not among the objectives. This analysis was shared by most gender advocates. In particular, there were criticisms with regard to the limited framing of gender equality in health which was reduced to women’s reproductive health and focused on pregnant women, mothers and their children. As put by one advocate:

> Maternal mortality has many causes, but women become reduced to women’s bodies! To vessels! ‘Infant mortality’ they say is ‘gender’, but that doesn’t get addressed! … Also [concerning] ‘violence’, what do you mean with violence? It is dangerous and scary how it gets depoliticized. It still is about power differences. (Interview 2013a)

The underlying vision of gender equality seemed to be mixed. In a number of programmes, a limited equal treatment approach seemed to underlie EU policy: men and women were considered to be *de facto* equal as they had equal rights to access health care. The EU Delegation thus seemed to conceptualize health – with the exception of school health and maternal health – as a gender neutral area which they were ‘not super conscious about’ as ‘health automatically is about men and women’ (Interview 2013b). Performance indicators on general access to health were not gender disaggregated as gender equal access was already assumed by the EU Delegation.

A ‘difference approach’ was present in some programmes, such as the programme on maternal and children’s health which accommodates for women specifically, with respect to their role as mothers. Arguably, the Risk Capital Facility Programme, which has a 30% quota for female employment, management and ownership, could also be considered ‘a difference approach’ as it was argued that women have a specific situation and are ‘historically disadvantaged’ from men and need specific actions to tackle this disadvantage.
In general, however, gender advocates evaluate the programme positively as being more long-term and having the potential to structurally transform society. In this respect the underlying vision can be defined as ‘transformation’. Nevertheless, one advocate was sceptical towards the transformative potential and pointed out that ‘quotas can’t work by themselves’ (Interview 2013a) as a place on the table does not guarantee a voice, because sexism at the workplace will not cease to exist. Or as she putted it:

We can’t really just rely on having the numbers, on having the managers. The 30 per cent, how do they negotiate if there is still sexism on the work floor? It is a more complex thing! … It is necessary to dig deeper in the analysis. (Interview 2013a)

**Intersectionality**

Although EU cooperation with South Africa contained some indicators measuring different grounds of discrimination and exclusion, these indicators were never connected in a meaningful way. An approach that recognizes intersectionality did not seem to be present in any of the EU–South African programmes. For example, the EU’s Erasmus Mundus Programme for the mobility of students and higher education staff to EU countries contained indicators on the recipient’s gender, disability and race, however these indicators were not connected, which leads to an incomplete view. The interviewed gender advocates were concerned about this and felt that linking these indicators together would indeed reveal significant distortions. Also, some were concerned about the degree of intersectionality in the RCF Programme (reserving a 25% quota for black people and 30% quota for female employment, management and ownership). They specifically questioned the extent to which black women were represented in the figures. Or as was put by one advocate:

This micro entrepreneurial development programme will be benefitting black men. It’s pushing numbers, it’s nothing substantial. (Interview 2013c)

Also interesting in this respect is that some gender advocates mentioned an implicit racial discrimination in the way civil society funding is distributed, as they felt it was easier for organizations headed by white women to receive funding because they speak ‘the right language’ – a language to which EU development staff can relate. Indeed, at the time of the research (2013) the staff in the EU Delegation were predominantly white and/or European. At the highest level of the hierarchy staff were exclusively white, European and male. At the hierarchy’s mid-level there were several white Southern Africans employed as Local Agents, while black Southern Africans were predominantly employed as drivers, security agents and cleaners. As was put by a black gender advocate:

It is largely influenced by the historical reality of the country. For example the GBV [gender-based violence] field was mainly dominated by white women and this has continued. It is problematic in the way you would understand issues, live experiences … It’s not difficult to write a proposal, but certain language is easier to use if you don’t live in that reality. For example [major donor in South Africa] is very fond of a discourse of ‘poor women’, ‘poverty’ … But who is she? It’s easy to picture a poor woman or what a poor woman looks like. For me
it is hard to define and … it speaks back to me. In certain ways … I am poor myself … The donor community seems to understand that terminology. (Interview 2013d)

**Structurally transformative focus of policies**

A structurally transformative approach seemed to be present to some extent (in the RCF and in the School Health Programme), but programmes focused mostly on practical instrumental needs (such as short-term low-skilled employment or maternal health). Most gender advocates applauded the RCF’s gender indicators for representation in management and ownership as it gave women ‘a far greater choice’ (Interview 2013e). Advocates were also generally positive about the School Health Programme and encouraged programmes that include the education of children and young adults on gender power relations, sexual harassment, STDs and (unwanted) pregnancy. They felt that raising awareness in schools to break taboos early on can have a potentially transformative effect on society.

However, gender advocates were very critical of the first two employment programmes. The first programme connected to the South African government’s ‘Community Works Programme’ offered short-time community jobs (such as cleaning gardens or making dolls or brooches) for a maximum of two days a week to provide poor people with an income (maximum 800 rand which is approximately 60–70 euros) and contained targets for the employment of youth and women. The second employment programme did not contain specific gender indicators, although the export factories for garments and beadwork that were set up employ almost exclusively women and youth. Gender advocates were sceptical towards both programmes and stressed ‘the importance of the quality of work’ (Interview 2013f). They considered the employment programmes as typical conservative approaches that build on stereotypical assumptions about women and entrench negative stereotypes in society. Advocates felt that such programmes only serve as ‘plasters’ (Interview 2013g) and cannot bring real change. Or as was put by one advocate:

> It’s good that people can get some money, but they don’t need dolls. Also … what is the education? … What does the community need? Maybe it is not making dolls. It is very stereotypical, it stereotypes women as cleaners, doll makers … It is … more charity based. It’s like giving the fish and not the rod. (Interview 2013g)

Some advocates were even more sceptical stating that such programmes create a backwards move as they undermined ‘women’s self-worth’ (Interview 2013c) and further entrenched stereotypes about the value of women’s work in the economy:

> The weight here is quite minimal. Women are not valued. It’s pushing numbers, but how will we develop women to be in positions with better salaries? … 800 rand is not even a salary as such. It’s care giving. It is seen as part of women’s burden. (Interview 2013d)

In general, advocates strongly felt that development aid should be geared towards more strategic ‘Gender and Development’ goals instead of practical, short-term ‘Women in Development’ measures, and gave concrete examples on how to tackle stereotypes and transform society:
A public works programme in construction, which would give women access to digging electricity [to lay electrical cables, etc.] and learn them to do maintenance, that would begin to challenge gender divisions of labour. (Interview 2013e)

**Empowerment of women’s rights advocates**

The empowerment of women’s rights advocates at different stages of the policy process was complicated by the use of sector budget support in EU development aid with South Africa, which entails ‘a transfer of funds to the partner government national treasury to be used in pursuit of an agreed set of sector outputs and outcomes’ (DG DEVCO, 2013). Although there were multiple contacts with gender advocates in the framework of the EU’s support to civil society, in general there seemed to be a lack of civil society involvement, as the main chunk of development aid was distributed through budget support. General and sector-wide budget support are indeed controversial as gender advocates worldwide fear it equals a deprioritization of gender equality ‘given the lack of public accountability systems’ and ‘mechanisms for the implementation of national obligations to gender equality’ (Karadenizli, 2007: 29). The interviewed gender advocates were also critical of the EU’s preference for budget support as they pointed out it only trickles down to some extent and ‘seldom gets down to the grassroots’ (Interview 2013g). Advocates argued that policies should start from what is necessary at the local level and stressed that – in the context of a gender neutral sector budget support – strengthening civil society becomes even more important to hold governments accountable. As it was put by one gender advocate:

> We have to be very careful in our relations with the state. We monitor the implementation of acts, we do research and we advocate our findings. But nonetheless we need to have a good relationship with them … Should our money be withdrawn … how can we hold them accountable? (Interview 2013g)

Gender advocates pointed out that gender had been largely forgotten in the EU’s dialogue with the Ministries of Health and Education and stressed the importance of a strong feminist movement to engage at the government level. Some advocates also questioned the accuracy of the government’s gender data provided to the EU. They claimed for instance that the government’s data on maternal mortality are biased as there is no accurate data collection taking place at the local level. As regards the EU’s support for civil society all interviewed gender advocates were familiar with the EU funding programmes as their organizations had already participated in EU bids, some of them successfully. Most respondents argued that such funding opportunities for civil society were absolutely necessary and felt grateful for its existence. However several advocates also mentioned problematic issues regarding the specific funding modalities. Most local EU calls for projects last two to three years, which do not allow organizations to engage in longer-term planning or conduct more time-intensive projects as they seldom offer instantly measurable results. Also some felt the EU is a quite technical donor geared towards ‘ticking boxes’ rather than real change on the ground. Or as was put by one respondent:
My fear is that this leads to good work on paper and in theory. [The EU] uses a very specific time frame. But if you want to measure issues related to people … You cannot look at attitudes in a two year period. It’s not reliable. Are they sustainable? What is the real impact? Funding needs to go to the causal level. (Interview 2013g)

The EU’s eligibility criteria are based on an organization’s legal status, work plan, budget formulation, short-term deliverables, pre-acquired financial capacities and previous experience in international projects. The strict bureaucratic setup makes it difficult for some non-state actors to fit their initiatives into ‘a successful project format’ and renders projects into aid industry products (Minoia, 2012: 87). Also some advocates felt that the projects which were granted funding are too focused on ‘reactive measures as supposed to being preventive’ (Interview 2013g) and that there were very few calls for proposals allowing civil society organizations to do research:

[Research] is very important for our advocacy work. It has to be evidence based. It is so hard to get funding for research. It is geared to academic research … But the way academic research is framed, it does not always work so well. NGO type of research is different. You need to understand the state and governance well, how to engage … It influences government and policies and it gives direction to our organization. We are able to pick up what are the gaps, but we need research to do this. (Interview 2013d)

Indeed, although the EU has distributed 26.4 million euros for various South African research projects under the ‘Science and Technology’ sector, funding for research seemed to be geared towards higher education institutions and companies, mainly on the topics of health, environment, bio-economy and ICT. The support the EU has been providing to South African women’s rights advocates in civil society can thus be evaluated as mixed: although it enabled them to empower themselves and sustain their organizations, it has also geared them towards certain agendas and work methods (focused on short-term deliverables and easily measurable results). Or as was put by one advocate:

Funding is a constant battle. We try to translate our work [to EU frames] and encourage them to think outside their box. Nevertheless proposals come with boxes that you have to fill, but sometimes it is just not possible to get our language into them. The EU has a top down approach to things, the expectations are quite clear. You have to fit into them. (Interview 2013a)

Transformation with reference to the prevailing contextual legacies

The gender advocates interviewed mentioned several ‘silences’ in EU–South African cooperation with regard to South Africa’s contextual legacy. South Africa, a relatively young democracy emerging from a totalitarian state, still bears the legacy of the devastating apartheid ideology. One such inheritance constitutes the former ‘homelands’ where black South Africans were confined during apartheid. The homeland’s lack of economic opportunities has forced many to work as migrant labourers. Typically, the homelands have been inhabited by women, children and older people, while husbands return periodically to reunite with their families (Outwater et al., 2005). The apartheid system, which ‘formally institutionalized the decades long practice of racial separation’, was
founded upon and extended existing racial and gender hierarchies’ (Britton, 2006a: 60–61). The demise of apartheid resulted in the transformation of the South African socio-political environment with gender and racial equality becoming pivotal factors in the building of the new democracy (Outwater et al., 2005). Women have been actively involved in the process towards democracy and significant gains have been made in the political arena (Britton, 2006b: 145). Today, the South African Constitution is one of the most progressive in seeking to promote equality and redress past discrimination (Scribner and Lambert, 2010). Nevertheless, while the struggle for a gender equal democracy has a long history in South Africa, the progress made during the transition has not automatically translated into gains for women in other areas such as employment or gender-based violence, especially when looking through an intersectional lens. Also, the country continues to top international rankings of occurrences of gender-based violence, exacerbated by the legacy of apartheid, the social consequences of a migrant labour force and the impact of patriarchal authority (Britton, 2006b). The EU–South African cooperation in the Eastern Cape, which has set up factories and created employment in poor areas with a high unemployment level, implicitly addressed one of these legacies of apartheid, as it typically involved the former ‘homelands’. In practice the interventions seemed to perpetuate the employment of black female labour in low-paid and labour-intensive industries. While well intended, the programmes in the new economic zones located in the former homelands did not significantly challenge existing racial and gender hierarchies resulting from previous ideological systems as there was only little upwards mobility and training provided. The extent to which inequalities of class, gender and race have being lessened as a consequence of the interventions thus remains unclear.

Another issue with regard to the legacy of apartheid was brought up by gender advocates who mentioned the EU’s seeming unawareness of South Africa’s specific socio-political environment in which gender and racial equality have become fundamental basics for democracy. In particular they mentioned the recently enacted Women Empowerment and Gender Equality Bill ensuring the 50/50 participation of women in both public and private bodies. With respect to the 30% female employees, managers and shareholders in the RCF, certain gender advocates were therefore sceptical. They viewed the indicators as ‘good minimum conditions’ (Interview 2013e) but indicated that in accordance with the upcoming Bill, as well as South Africa’s strong legacy of making clear constitutional provisions on gender equality, the targets should have been be set at 50%.

Also, South Africa’s specific context with regard to education was put forward. In the past, education in South Africa ‘reflected the fragmented society in which it was based’, and ‘hardly created conscientious, critical citizens’ (Msila, 2007: 146). Nevertheless a gender dimension was not explicitly included in the EU’s cooperation programme. It was argued by the EU Delegation that ‘there is no gender aspect, as there is more enrolment of females compared to males in primary, secondary and tertiary education’ (Interview 2013h). Furthermore, the EU Delegation pointed out that ‘there is more drop out of boys’ and that ‘gender is not a priority now’. Accordingly it was decided to focus on improving the quality of education as this ‘is such a an urgent problem’ (Interview 2013h).

Gender advocates warned however that it should not ‘be just about bums on seats’ (Interview 2011g) and defined gender equality in schools as going beyond the numerical
data. Activists pointed out the issue of gender-based violence in or on the way to school, differences in performance due to girls’ care responsibilities and the lack of intersectional data which connected gender to race, class and/or disability. Also the concept of ‘quality’ was defined much more broadly. Gender activists stressed that, in the South African context, education should be used as a transformational tool to empower learners for effective citizenship rooted in the constitutional values of democracy, social justice, non-racism, equality and reconciliation (Msila, 2007). A qualitative education would thus question stereotypical gender norms and encourage students to take up non-traditional study choices:

The quality of education is poor. Schools are not changing the current cultural practices, perceptions of women in society. It is not going to stop girls from doing the housework, the cooking, the cleaning … We need to educate qualitatively, equity driven. So that you build a generation that can question cultural and traditional norms, the roles and obligations of men and women … How do you make sure women are able to genuinely access, to question? (Interview 2013g)

**Discussion and conclusion**

To engage with the dilemma of whether models developed for assessing quality in EU internal policies can be used unequivocally for assessing EU external policies, I have evaluated the two-dimensional quality model of Krizsan and Lombardo (2013) and suggested an adaptation to better allow for the analysis of gender policy implemented outside of Europe and be more inclusive towards the particular context. Especially the model’s criteria regarding the procedural aspects of quality – the empowerment of women’s rights advocates and the degree of transformation with reference to the prevailing context – have proven to be particularly relevant for me as a Europe-based researcher when analysing gender policies and mainstreaming in EU external policies. I argue that, to allow for an in-depth analysis of EU gender policy abroad, the procedural criteria need to be ‘mainstreamed’ throughout the entire research design. I proposed to do this by explicitly taking into account the perspectives of gender advocates from the national context as a touchstone to evaluate each of the designated quality criteria.

I conclude that the inclusion of gender advocates from the context being investigated, as well as taking into account intersectional power dimensions in the selection of these advocates are indispensable when analysing EU external policy for a number of reasons.

First, as the cosmopolitan world of EU expatriates is a world of frequent mobility around the globe, EU staff abroad can be unaware of women and men’s day-to-day realities and the history of gender relations in the country they are residing. It is therefore crucial that an evaluative model takes the ‘perspectives of gender advocates from autonomous feminist movements into account as a touchstone for the evaluation of quality. Although national gender advocates represent only a specific perspective of a higher-educated and more privileged elite, their contextual groundedness and years of experience in the field of gender equality still make them particularly useful to contextualize gender equality quality criteria and to contrast EU policy and practice. As the views of
EU bureaucrats are often predetermined by the EU’s institutional culture (such as the focus on poverty reduction and economic growth as drivers for development), it is crucial to contrast EU perspectives, not only with quality criteria set forth in feminist literature, but also with the concrete views of gender advocates from the specific region. The case of EU–South African development cooperation has indeed shown that there are several specific issues – such as the legacy of apartheid, the impact of patriarchal authority, the impressive legal arsenal for protecting women’s rights – that should be taken into account and that would be lost without further reflection on the specific, historically shaped social, political and economic context. Taking into account the perspectives of gender advocates allows for a contextual reflexivity which may unveil policy-makers’ paternalist assumptions which question progressive universalist claims of women’s rights as a violation of a country’s democratic sovereignty and assume these claims to be ‘western’ and inapplicable to more ‘traditional’ settings. In particular, the case has demonstrated that the inclusion of gender advocates is necessary to avoid stereotypical, paternalist and/or Eurocentric ideas about the meaning of ‘quality’ of gender policy abroad. For instance, the definition of educational quality of the EU Delegation is limited and paternalistic as it assumes that girls’ ‘bums on seats’ is enough in a developing region. Also, while the RCF’s 30% quota for female employees, managers and shareholders seems like a perfect transformative one-size-fits-all solution, it neglects the more transformative South African contextual legacy which aims at a 50/50 representation.

Second, in-depth analysis of the extent to which intersecting inequalities of class, gender and race are being intensified or lessened as a consequence of EU policy interventions is a complex endeavour. It can be difficult to understand people’s experience of inequality from the outset or based on academic literature alone. An approach grounded in the lived realities of people seems more appropriate to detect possible ‘silences’ (what is not said) in EU development discourse and practice (Debusscher, 2011), and allows to question policy-makers’ labels and predetermined solutions, as well as the implications they have. Intersections of race, disability and gender, for instance, have been neglected in the EU’s (higher) education programmes, while some of its employment interventions seemed to perpetuate the employment of black women in low-paid labour-intensive industries and confine ‘poor women’ in gender stereotypical roles with no upward mobility.

Third, the proposed method can be considered empowering in itself as it allows to hear the voices of national actors that might otherwise not be heard at the European level. This is especially pertinent in the context of the Global Aid Effectiveness Agenda, where general and sector budget support are increasingly being used as aid modalities in EU external policy to promote country ownership and accountability – often at the expense of civil society involvement. From a feminist perspective budget support is controversial as it lacks mechanisms for the implementation of (inter)national gender equality obligations and raises questions such as ‘who owns?’, ‘who is accountable to whom?’ and ‘how are gender power relations at play in these processes?’ Taking into account the perspectives of gender advocates from the context helps to evaluate gender power relations in national decision-making processes and helps determine whether gender is mainstreamed in an agenda-setting manner that gives ‘attention to the substantive objectives of the women’s movement’ (Jahan, 1995: 127).
Finally, empirical research has shown that the inclusion of different feminist voices helps to guarantee better quality. One last lesson to be learned from this study is that this is the case, not only for the content and process of policies, but also for the method with which these policies are evaluated, especially when analysing EU external policy as a Europe-based researcher. As an institution’s structures, practices and norms shape ways of valuing, behaving and being, which benefit actors who conform but marginalize the perspectives of actors who do not conform (Mackay et al., 2010) – both within EU institutions, as well as within European gender and politics scholarship as an institution – it is the role of feminist research to include these perspectives and enhance women’s capacity for self-determination methodologically. A research method should therefore embody the principle of empowerment by involving not only perspectives drawn from feminist scholarship, but also from outside academia so as to enhance a contextually grounded reflectivity on the quality of EU gender policies abroad.

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Notes

1. As regards the selection of gender advocates, interviewees should be carefully drawn from the different kinds of feminist organizations operating in the national context, and include organizations of different backgrounds (e.g. taking into account connections between gender and class identities and/or between gender and racialized identities), experience (young organizations and more established ones), size (e.g. with more or fewer financial and human resources) and issue areas (for instance organizations on gender-based violence or women’s employment, but also feminist men’s organizations or broad multi-issue organizations). Key feminist organizations and gender advocates can be identified by literature review, followed by a snowballing technique during the course of the interviews.

2. According to Weldon, if the feminist movement is too contained in the state, its ability to criticize government policy, ‘challenge the existing order of priorities’ and draw attention to issues that are not on the agenda, may be curtailed (2012: 37). The researcher should thus carefully examine the extent to which activists are located inside or outside of government (e.g. to examine whether activists are members of the government commission on women, the ruling party or the family of the ruling party) and whether their organizations originate outside of non-feminist political parties (Htun and Weldon, 2012).

3. Data gathering included the collection of EU development policy documents, as well as 16 in-depth semi-structured expert-interviews conducted in Johannesburg and Pretoria. A list of interviews cited in this article is provided in the Appendix.

References


**Appendix**

List of interviews referred to in this article:

Interview 2013c: civil society representative, 21 January 2013, Johannesburg.
Interview 2013e: civil society representative, 18 January 2013, Johannesburg.
Interview 2013f: civil society representative, 14 January 2013, Pretoria.
Interview 2013g: civil society representative, 21 January 2013, Johannesburg.