GLOBAL DIALOGUE

12.1

3 issues a year in multiple languages

> Editorial

Universities and science are undergoing far-reaching changes as a result of their marketization or quasi-marketization under neoliberal governance. In this issue of *Global Dialogue* we take up this topic in our section 'Talking Sociology.' Jill Blackmore has been studying the profound restructuring experienced by Australian universities over the last decades. In this interview she elaborates on these restructurings, the forces that drove them, and the effects they have on academic knowledge production and epistemic justice.

The first symposium presents parts of a global research collaboration on diverse workers' movements. While Dario Azzellini examines the impact of the current pandemic on workers' movements worldwide, including aspects of gender and race, Sarah Raymundo explores the traces of colonialism in the Philippines and its continued impact on trade union struggles. Hiroaki Richard Watanabe shows how the deregulation and liberalization of the Japanese economy has shaped union organizing and the challenges faced by workers today. Verna Dinah Q. Viajar examines the development of trade unions in Indonesia and their role in the overthrow of the Suharto regime, taking into account political and economic factors.

On the one hand, the transformation of capitalism that has been going on for more than five decades has affected gender regimes in many countries. On the other hand, deep ongoing changes in gender relations, ways of living and the welfare state have challenged the established division of labor, care responsibilities, and norms and values in different areas of social life. Sylvia Walby and Karen Shire, both experts in theoretical and empirical research on the relation between capitalism, crisis and gender, organized a symposium on the varieties of gender regimes. It maps the differences and commonalities in gender relations, arrangements and regimes across different countries and sheds light on international tendencies of our time. It also shows how the varieties of capitalism and the welfare state are strongly interwoven with varying modes of reorganizing and reshaping gender regimes.

The section 'Theoretical Perspectives' continues this reflection on gender and society but from a different perspective. Raewyn Connell, pioneer and most renowned representative of men's studies, retraces this research strand and analyzes how societal and scientific developments led to new perspectives on masculinities.

It is with great sadness that we learned about the passing of Mona Abaza, who died on July 5, 2021. In this issue, colleagues and friends worldwide bid farewell to this exceptional sociologist.

The country focus of this issue, organized by the prominent sociologist and social theorist Sujata Patel gives impressive insight into today's sociology in India. Established and young scholars have collaborated to this section by sharing their reflections on many important issues, including how their sociological fieldwork is challenged by issues like violence, inequality, or discrimination.

In our 'Open Section' we have started a collaboration with ISA's journal *Current Sociology*. Ian Carrillo, who works on racism and anti-environmentalism in the USA and Myrna Dawson, who investigates femicide followed our invitation to share their scientific work with the wider academic and non-academic audience of *Global Dialogue*. ∎

Brigitte Aulenbacher and **Klaus Dörre**,
editors of *Global Dialogue*

2

> *Global Dialogue* can be found in multiple languages at its website.
> Submissions should be sent to globaldialogue.isa@gmail.com.

ISA International Sociological Association

GLOBAL DIALOGUE

> Editorial Board

*In this interview **Jill Blackmore** discusses the profound restructurings Australian universities have undergone over the last decades, the forces that drove them, and the effects they have on academic knowledge production and epistemic justice.*

*This symposium addresses numerous **workers' movements and struggles** around the world, from global considerations to particular union struggles in Japan, Indonesia and the Philippines.*

*The articles included in this symposium about **varieties of gender regimes** discuss new perspectives on gender relations at the macro level needed for a global analysis.*

3

> In This Issue

4

"*Is violence a fourth institutional domain alongside
economy, polity, and civil society?*"

Sylvia Walby and Karen Shire

> Entrepreneurial Universities and Epistemic Injustice

An Interview with Jill Blackmore

Jill Blackmore PhD is Alfred Deakin Professor in Education, Faculty of Arts and Education, Deakin University, Australia, and Fellow of the Academy of the Social Sciences. She researches – from a feminist perspective – globalization, school and higher education policy, and governance; international and intercultural education; leadership and organizational change; research assessment and epistemic justice; spatial redesign and innovative pedagogies; and teachers' and academics' work. Recent projects have focused on international student mobility, identity, belonging, and connectedness; employer attitudes to graduate employability in China and India; and school autonomy reform. A previous project is to be published in *Disrupting Leadership in the Entrepreneurial University: Disengagement and Diversity* (Bloomsbury, 2022). Prof. Blackmore has been on advisory committees and statutory authorities related to education, gender equity, and diversity policy. She has provided policy advice to the OECD, governments, and private and professional organizations, and has developed evaluation frameworks. Prof. Blackmore is former Inaugural Director of Deakin Centre for Research in Educational Futures and Innovation, President of the Australian Association of Research in Education, and currently Vice-President of the Australian Association of University Professors.

Here she is interviewed by **Johanna Grubner**, a PhD researcher at the Johannes Kepler University, Linz, Austria, and assistant editor of *Global Dialogue*.

Jill Blackmore.

JG: You have been studying the profound restructuring that Australian universities have undergone over the last 30 years. What were these restructurings, what forces drove them, and what effects did they have on academic knowledge production?

JB: Australian and international governments have sought to tightly link universities to national economies, beginning in Australia with the unification of the sector into 39 universities after 1990. New public administration approaches and neoliberal policies promoting markets were circulating widely in the Anglophone nations and infiltrated into universities at this time. Over three decades, universities globally have experienced the processes of internationalization, managerialism, marketization, financialization, and now datafication enabled by digitalization. Vice-Chancellors (VCs) and Deans have accumulated significant executive power through serial restructuring and have replaced elected Deans and Heads of School with appointments since the 1990s. At the same time, the upper levels of senior management have expanded exponentially, based on the claim that universities need

to be agile in response to changing geopolitics and policy volatility. Universities are funded for teaching based on student numbers in particular courses. Due to reduced government funding, Australian universities have relied increasingly on international students for discretionary income, leading to considerable investment in marketing and cross-subsidization of research from teaching.

Organizational restructuring has been seen as the solution to improve efficiency and effectiveness but has never been evaluated as to its effects. The centralization of managerial power with regard to policy and budgets has sidelined collegial practices of academic governance, with Academic Boards relegated responsibility only for quality assurance. Significant disenchantment is expressed by academics over high workloads and lack of a role in decision-making. Institutional flexibility has been achieved through casualization of the academic workforce and high teaching loads. This has impacted particularly on women, who are most often on contract and concentrated at lower levels of the academic workforce. Together with the introduction of

>>

5

research assessment in 2010, the overarching effect of these trends on knowledge production is that what can be counted (e.g., metrics) or commercialized is valued more; academic practices have, thus, been shaped by quantification and the focus on measurable and immediate outputs.

JG: Could you speak about the effects of the transformation from a comprehensive to an entrepreneurial university, particularly for female academics and feminist knowledge production?

JB: As the policy focus has moved from research capacity building in the 1990s to quality and excellence in the 2000s with global rankings and research assessment, VCs have sought to make each university distinctive through prioritizing teaching and research, leading to greater differentiation between and within Australian universities. This has produced a shift from a comprehensive university to an entrepreneurial one focused on partnering with industry, government, and philanthropists. The postgraduate market has also collapsed with deregulation and multiple new private tertiary education providers competing online and offline and offering micro-credentials – shorter and cheaper courses in the profitable niche markets.

Viewing universities as sites of progressivism, socially conservative governments initiated the culture wars against multiculturalism, feminism, and Indigenous reconciliation in the 1990s, fueled by populist Murdoch press outlets and extreme-right media commentators. Socially conservative governments have exploited a cultural sensibility in Australia favoring instrumentalist attitudes towards education, with national policies focusing on science, technology, engineering, math, and medicine (STEMM). Ignoring government data, they have argued that the humanities and social sciences (HASS) have no vocational value.

The effect of multiple restructurings and political ideologies has been gendered, producing epistemic injustice. First, because the HASS faculties where women are concentrated have been amalgamated, thereby reducing HASS representation at executive decision-making level. Second, universities have followed the money in STEMM, by default if not intent thereby skewing resources away from HASS. Third, even when women get into senior management, the pattern nationally is for Deputy Vice-chancellor (DVC) research portfolios to be dominated by men, nearly always from STEMM, and the teaching and learning DVC portfolios, or domestic labor, to be dominated by women. Finally, the escalating workload demands and increasing hurdles required to become a research professor have a greater impact on women, particularly in STEMM, who, in Australia, continue to bear the burden of family, work, and care without universal childcare. The overall structural and cultural effect is gendered in terms of what knowledges are valued (epistemic injustice) and how women's academic careers are shaped. The lack of ethno-racial diversity of university leadership is never mentioned in policy or by university management, despite the cultural diversity of the academic, student, and Australian populations.

JG: Can you elaborate a little further about what kinds of structural and political forms of epistemic injustice are produced in Australian entrepreneurial universities and what consequences they have?

JB: The entrepreneurial logic means that knowledge is valued only in terms of its capacity to be quantified and possibly commercialized. This logic of quantification results in epistemic injustice. First, it ignores the social and material conditions of knowledge production – the social relations of collegiality and collaboration, the emotional labor of teaching and researching, and the reproductive domestic labor that supports that work. Second it is premised on market contractualism, which neglects these relationships through which knowledge is produced (collegiality). Third, the logic assumes that innovation is only that which can lead to a process or product, and treats economic relations as if distinct from social relations rather than being reliant on them. Entrepreneurialism therefore feeds a conservative and toxic gender politics that devalues academic work that focuses on the social and relational. This is dangerous for democracies, as socially conservative but neoliberal governments in Australia have been antagonistic to the university sector in a post-truth time when expertise and science are being challenged not only by conspiracy theorists but also governments.

JG: Speaking of the antagonistic stance of conservative and neoliberal governments towards the university sector, in recent crises – and in the global pandemic in particular – a striking disconnection has been observable between social-scientific knowledge and research, on the one hand, and the societal and political responses to these crises, on the other. What are the Australian circumstances in this area and what are the recent developments?

JB: Indicating a strong democracy, Australians showed a collective willingness during the pandemic to accept temporary loss of rights for the public good; they realized and valued the benefits of the safety net of a universal health system and of science. The problem lies in the failure of conservative governments (and VCs), as well as in the Australian sensibility, to recognize the cultural, political, and economic value of HASS, often equating science with STEMM. Yet both the pandemic and the climate crises highlight the significance of HASS. First, the Academies of Social Sciences and Humanities were part of the Rapid Response Forums (panel of experts model) created by the Chief Scientist to provide advice to the National Cabinet. Secondly, the role of HASS was evident in the communicative practices of the state and Indigenous leaders to manage Covid outbreaks. Socio-psychological research was critical to understanding individual and collective responses to the pandemic as was

critical political, economic, and social analysis by journalists and academics monitoring and debating effects on human rights and responsibilities. Despite this, while the neoliberal federal government took unprecedented economic action to support business and individuals, it continued its ideological war against HASS, excluding universities and the arts from federal support, telling 500,000 international students to go home if they could not support themselves, and introducing legislation to make HASS subjects more expensive and vocational courses less expensive while reducing per capita funding to universities.

Politically, the Prime Minister (PM) was forced by state premiers to accept lockdowns and state border closures to control virus outbreaks, action accruing to the premiers' significant political capital as leaders, in contrast to the PM's failure to deliver timely quarantine and vaccination rollout. State premiers stood beside chief health officers in daily press conferences to provide expert evidence and policy. Science's legitimacy was reinstated as epidemiologists, scientists, and science commentators became celebrities. In the end, although they were the most affected sectors financially, the arts and hospitality sectors were crucial – in the online environment of lockdown – for mental health and now for the recovery. In another paradox, the PM is relying on technology as the solution to reducing carbon emissions, while not increasing research and development funds to universities.

JG: Recently you have been speaking out against the situation Australian universities – staff and students – have been facing during governmental COVID-19 restrictions. What are your main points of critique and what concerns do you have about these developments and their possible effects on the future of academia?

JB: Australian governments and recent Coalition governments in particular have been careless with universities. They have treated universities as income sources (education services being the third-largest export in 2019) rather than investing in universities as knowledge producers and central to democracies as a critic and conscience. When flows of international students were halted, the pandemic exposed the vulnerability of Australian universities resulting from underfunding, reliance on international students for research, policy volatility, changing Indo-Pacific geopolitics, and the rise of China. VC responses have been to exploit the opportunity to restructure (often using management consultants), making 40,000 academic and professional staff redundant in 18 months (20% of workforce) and not renewing contract or sessional academics who constituted 66% of all staff. HASS subjects in particular have been closed (e.g., languages, sociology). Academics had already lost trust in university management due to job precarity, high student-staff ratios, administrative overload, lack of research funding, managerialism, corporatization of governance, disenfranchisement from decision-making, and risky investment in building and financial markets. This dis-

trust has been converted into anger by emerging collective action, for example through the formation of the Australian Public Universities Coalition. Academics see that the university's distinctiveness from private educational providers and consultancy firms is endangered. Multiple providers are offering cheaper micro-credentials and multinational firms are investing in training while benefitting from the government's outsourcing of research and consultancies. The hollowing out of higher education will take decades to recover from at a time when multiple challenges require new knowledge, creativity, and innovation to inform social and economic transformation for sustainable futures.

JG: In your opinion, what could be the starting point to improve the situation at Australian universities for employees and students and to strengthen the role of universities in society? Where are the main pivot points to achieve a positive change?

JB: A key issue is how to shift the Australian cultural sensibility to realize the importance of universities and HASS for Australia's cultural, social, and political future. This means educating the populace and government that universities are distinctive because they do more than make graduates "job ready." VCs have squandered the opportunity (or lack the collective will) to lead debates about the importance of universities to democracies or convince governments that university research is critical to transitioning to a sustainable future.

Internally, university managers have to regain the trust of their employees by providing secure employment and a safe work environment. Shared governance would draw on the expertise of academics currently ignored by management. It requires academic representation on management and key selection panels; an independent academic body to inform and encourage critical debate; industrial agreements that protect and not constrain academic freedom and work conditions; collaborative processes of decision-making which facilitate meaningful feedback and not tokenistic consultation; and equity- and environment-driven strategic plans and budgeting. Universities are also obligated to their local communities to offer a comprehensive education because universities are central to urban and regional communities and economies. Greater specialization and differentiation between universities will reduce the opportunities of students already struggling to access and stay in university due to distance and costs. A good university would recognize the multiplicity of knowledges and importance of HASS for sustainable and inclusive learning environments and democracies. It would promote social innovation premised on a social or relational (rather than market) contractualism that values relationships (collegiality) as core to being and doing in universities and societies. ■

7

> The COVID-19 Pandemic and Class Struggle

by **Dario Azzellini**, Universidad Autónoma de Zacatecas, Mexico

Farm workers in Yakima valley, USA on strike for better COVID-safe work environments in May 18, 2020. Credit: Facebook page Familias Unidas por La Justicia, Edgar Franks.

Crises under capitalism tend to increase existing inequalities. This is also a consequence of the handling of the COVID-19 pandemic. Global labor income decreased by an estimated 10.7 % (or US$3.5 trillion) in the first nine months of 2020 compared to the previous year. Meanwhile, the total combined wealth of the more than 2,200 official billionaires worldwide grew from $9.5 trillion on December 31, 2019 to an estimated US$11.4 trillion a year later. Studies throughout the world confirm that poor and working-class people are at a higher risk of being infected and of being hospitalized due to COVID-19 and that Black, Indigenous, and racialized working-class populations experience disproportionate COVID-19 infection and death rates.

> Struggles linked to the pandemic

Working-class people and communities rose up globally "because of" and "despite" the pandemic. Strikes and protests have been taking place in sectors that have been particularly impacted by increased operating pressure and risk of infection due to the pandemic, and that were already characterized by poor working conditions and low pay: healthcare and nursing, warehousing, mail-order businesses and logistics, passenger transportation, and food production, especially meat-processing and agriculture.

The healthcare sector, one of the main targets of neoliberal austerity policies for decades, has seen strikes all over the world, from the Americas and Europe to Asia and Africa. The workforce in this healthcare sector is mainly female; especially in the case of nurses, the low wages and high risk have a gender and racial dimension. Strikes have happened also in the public transport sector. Self-organized wildcat strikes by drivers took place in various US cities. In Brussels in May 2020, public transport workers staged a wildcat strike after the union reached an agreement with management without their consent. Workers in the metro systems in Mexico City, Medellín, and Santiago de Chile, and in the Japanese railways went on strike. In Germany, the trade union ver.di waged a series of strikes in urban public transport. Italy and Greece faced strikes across the public and private transport sector to secure job protection and increased salaries. Workers' struggles in the food industry started in the meat processing sector in Western Europe and the US, where the workforce is predominantly migrant and infection rates were very high. In Italy, Spain, and the US, migrant agricultural workers went on strike. Strikes in the food retail sector in various countries followed. In the distribution and logistics sector strikes for increased protective measures were held in the early days of the pandemic from Australia to the US. In Italy all logistics companies and warehouses, including Amazon, TNT, DHL, and UPS, have experienced strikes and massive staff absences. Food delivery workers in Italy went on strike several times during the pandemic. A court forced the companies to hire all 60,000 workers delivering food by bicycle as dependent workers with benefits.

>>

8

> Struggles despite the pandemic

Strikes and workers' struggles with no or only limited connection to the pandemic also took place. Labor conflicts gripped production plants where mass layoffs or even permanent closures were planned. In the Dutch IJmuiden steelworks, which is owned by the Indian Tata Steel, workers staged a strike lasting more than three weeks, thereby preventing the dismissal of 1,000 of the 9,000 workers and securing an employment guarantee until 2026. In India in December 2020, a mass strike took place in response to the government's plans of massive deregulation of labor relations and the privatization of the huge public sectors. Some 250 million workers from the public and private sectors went on strike. Since September 2020, farmers in India have been protesting new laws favoring private investors and corporations. After the farmers stormed Delhi in January 2021, the government suspended the laws for 18 months. For the Prime Day bargain hunt in October 2020, Amazon workers in Germany, Spain, and Poland went on strike for better pay. A series of several-day strikes staged at Amazon sites across Germany followed. In the port of Bilbao, Basque Country, the 300 dockers of different companies went on strike for 55 days until the companies accepted several of their demands – including the limit of a maximum of 1,826 work hours per year, breaks at work, and holidays.

A variety of popular working-class revolts also happened or continued during the pandemic. The protests against the dictatorial coup regime in Bolivia forced new elections and brought back to power the MAS (Movement Toward Socialism) which had been ousted by the coup. In the US the main union AFL-CIO failed to respond adequately to the Black-led multiracial working-class revolt beginning in May 2020. However, in May and June alone, more than 600 work stoppages or strikes took place in solidarity with Black Lives Matter (BLM). Bus drivers refused to transport protesters to jail. The International Longshore and Warehouse Union (ILWU), which is 65% Black, shut down ports across the US Pacific Coast for almost nine minutes on June 9, 2020, the day of George Floyd's funeral. On June 19, the holiday commemorating the end of slavery in the US, the ILWU went on a full eight-hour shift strike in all 29 West Coast ports. On July 20, unions and movements, including the ILWU, United Farm Workers, and the National Domestic Workers Alliance, partnered with BLM to organize the *Strike for Black Lives* in more than 25 cities.

> New sites of labor action

Payday Report concludes that during the pandemic in 2020 the US saw its largest wave of strikes since 1946. According to the US Bureau of Labor Statistics, 2020 was – aside from 2009 – the year with the lowest number of industrial disputes. However, the latter counts only disputes involving 1,000 or more workers in one workplace, ignoring changes in the production structure. The new labor unrest is explicitly coming from the margins, from sectors unorganized before, from new unionizing, in working conditions that apply methods besides those considered as "industrial action."

During the COVID-19 pandemic, as in previous years, workers' struggles tended to start with self-organized struggles and unions with shop floor organizing. Struggles from the shop floor can respond faster and in more flexible ways. The traditional unions mostly avoided actively promoting strikes and when they were involved, it almost always occurred due to rank-and-file pressure. Neoliberalism and changes in production have significantly undermined the old models of organization, but new struggles and organizational structures are emerging globally. The weakness of the labor movement should still not be overlooked, however. In most contexts, the actions fall far short of what would be necessary to actually shift the balance of power in favor of labor. Nevertheless, workers' mobilizations during the pandemic demonstrate that the assumption that class is no longer a relevant category is wrong. Moreover, the evident vulnerability of global supply chains increases again the structural power of workers in globalized manufacturing industries.

Interrupting profits on a large scale remains the most powerful tool the working-class has. In this context the relationship between production and reproduction must be reconsidered, as should be the issue of class struggle and who wages it. Migrant workers make up a significant part of the new working-class in the capitalist centers. Gender and "race" neither replace class nor contradict it – they must be integrated into the analysis of capitalism and exploitation hierarchies. In her analysis of class struggles fought by women, Paola Varela makes a crucial observation: "the workplace is not taken as a sectorial space but as a powerful position […] that could serve as a *catalyst* and strengthen the claims of the working-class as a whole." ◼

Direct all correspondence to Dario Azzellini <da483@cornell.edu>

9

> Militant Labor Organizing
in the Philippines

by **Sarah Raymundo**, University of the Philippines Diliman, columnist for Bulatlat.com, and organizer for the International League of Peoples' Struggle (ILPS)

A demonstration by activists of the Workers Union "Kilusang Mayo Uno" (KMU) in the Philippines. Credit: KMU.

The victory of the 1896 Philippine Revolution against Spain after the latter's nearly 400 years of colonization was sabotaged by US imperialism. The transfer of countries under the Spanish empire – the Philippines, Cuba, Guam, and Puerto Rico – to the US was legitimized through the 1898 Treaty of Paris; the US paid Spain $20 million as "compensation." This marked the end of the Spanish empire and the continuing colonization of the Philippines by US imperialism, a project defined by neocolonial institution-building and genocide. This has resulted in a persistent economic underdevelopment that maintains an export-oriented and import-dependent economy with a huge army of reserve labor.

> Kilusang Mayo Uno, the May One Movement

In this context, economic campaigns such as wage hikes and contractualization schemes must be seen and raised as political struggles. Kilusang Mayo Uno (KMU/ May One Movement) was founded on May 1, 1980 with the following objectives: 1) to gather and represent progressive workers' organizations that advocated anti-fascist cam-

paigns under Martial Law; 2) to organize and consolidate progressive workers' organizations towards the goals of the national democratic struggle against US imperialism.

In 2018, KMU submitted an official membership of 115,000 to the International Trade Union Confederation (ITUC). Its current political and economic union work involves solid and on-the-ground organizing in Export Processing Zones (EPZ), urban poor communities, call centers, and private hospitals; the formation of broad alliances with other workers for wages and against tyranny; and the provision of a broad campaign center for popular labor issues amidst the COVID-19 pandemic. KMU holds fast to the principle of the peasant-worker alliance as a key force in the struggle for national liberation, thereby showing how labor in the Global South has always had to fight against the violent drain of imperialism.

Of the Philippines' population of 108 million, approximately 3.9 million (3.6%) are industrial workers, which includes workers in manufacturing, construction, export-growing businesses, and other wage earners. Since 2017,

>>

KMU has organized to address the phenomenon of contractualization and the increasing semi-proletarianization of Filipino labor. The latter has pushed the organizing capacity of KMU to reach out to urban and rural poor communities where there are irregular wage earners (10.4 million) and non-wage earners (6.3 million) such as vendors and other informal workers.

> Sites and modalities of labor in the Philippines

The class of landless peasants has been the reserve labor and actual farm workers for foreign agribusiness ventures. Displaced landless farmers populate the city and work as contractual labor in local factories and multinational EPZs. A rigid policy of contractualization makes for precarious work and a de-unionized workplace. Others who cannot find a job enter the informal economy.

The absence of an industrial base, which is the source of unemployment in the Philippines, has also paved the way for two modalities of labor which respond to the demand for cheap service labor by global capital in the form of outsourced and exported labor.

The first of these modalities is outsourced labor. The Philippines is the world's undisputed "call center capital" – overtaking closest rival India – with 16% to 18% of the global market share. There are 851 registered business process outsourcing (BPO) companies in the country; more than half of these are call centers (429), and a large chunk of the others are firms providing IT-related services (400 or 46.2%). The remaining are medical transcription businesses and animated film and cartoon production houses. As a US semi-colony, the Philippines provides 65% of its outsourcing services to its imperialist master; it also serves clients from Europe, Australia, and New Zealand. The latest data show that there is a total of 675, 600 workers in the BPO industry. Dubbed by the government as the country's "sunshine industry," Filipino labor in this sector is required to follow the working hours of the client's time zone.

The second modality is the export of labor, which has been the Philippine state's stopgap solution and cornerstone policy up to the present. Overseas Filipino Workers (OFWs) are the top dollar earner and GDP booster. A 2018 World Bank Report reveals that in 2017 alone, the Philippines raked in Php 1.72 trillion ($32.6 billion) from OFW remittances.

> Linking workers' struggles and anti-imperialism

With the changing landscape of Filipino labor since Marcos' Martial Law, worker organizing has also meant addressing the main consequences of an imperialist system for workers in the Global South. This includes keeping Filipino labor cheap on account of wage hierarchies based on global unequal exchange. Another consequence is the intensified production of a large army of the unemployed in the periphery, which has resulted in the increasing semi-proletarianization of Filipino labor. This accounts for the partnership between foreign capital and domestic comprador interest defining labor relations. Semi-proletarianization as it happens in the Philippines is a process in which laborers are forced by an imperialist system to survive through wageless, irregular, and contractualized labor.

This makes urban and rural poor communities labor-concentrated sites where an anti-imperialist working class politics must be cultivated. KMU meets the people where they are with the goal of collectively transforming the social, political, and economic dimensions of life from community to nation. It organizes where families of jeepney drivers and informal workers live. By creatively supporting the formation of workers' organizations in call centers, KMU addresses the latest forms of wage arbitrage in business process outsourcing.

A crucial lesson to be learned from KMU in its 40 years of struggle is that unionism in a semi-colony cannot make a convenient choice between economic or political struggle. The role of the state is critical in this regard. It aids the transformation from what is otherwise a confined economic struggle between workers and capitalists within a particular site of production to a locus of globalized political struggle in which the Leninist thesis of the state as an instrument for the exploitation of the oppressed is confirmed. In this context, trade unions in the Global South like KMU can only be militantly anti-imperialist and internationalist in their historical struggle to free labor from the clutches of global capital. Theirs is an anti-imperialist and anti-fascist working class struggle, inextricably linked with the call for free land redistribution and national industrialization toward a bright socialist future. ■

Direct all correspondence to Sarah Raymundo
<sarahraymundo1976@gmail.com>

11

> Unions and Labor Market Deregulation in Japan

by **Hiroaki Richard Watanabe**, Ritsumeikan University, Japan

"No more karoshi" (deaths by overwork) protest in Shimbashi, Japan, in 2011. Credit: Own work of Nesnad, CC BY-SA 4.0.

Japan has suffered from economic stagnation since the collapse of the bubble economy in the early 1990s. Japanese companies also have experienced intensified economic competition from neighboring East Asian countries. In response to employers' demand for greater labor market flexibility to cope with this situation, the government of the Liberal Democratic Party (LDP) has implemented labor market deregulation since the 1990s by increasing its authoritarian tendency in the policymaking process. To implement neoliberal labor market deregulation, the LDP government has excluded labor unions from the policymaking process in several Cabinet councils.

> Neoliberal labor market deregulation

With respect to deregulation of non-regular employment, the 1999 amendment to the Temporary Work Agency Law liberalized temporary agency work by allowing employers to use it widely, with only a few exceptions (including manufacturing). The 2003 amendment enabled employers to use temporary agency work in the manufacturing sector. Given its importance in the Japanese economy, this amendment was significant. Most recently, the 2015 amendment enabled employers to use temporary agency work without any time limit if employers change temp workers every three years.

>>

Due to the implementation of neoliberal labor market deregulation, the number of non-regular workers has increased; the current percentage of non-regular workers among total workers is almost 40%. Their employment security is low, as seen in the many dismissals during the global financial crisis in 2007-8, and most recently during the coronavirus pandemic. Their working conditions are poor, as characterized by low wages, insufficient access to social security, and so on.

Although regular workers are more protected, their working conditions have become poorer in terms of wages, work hours, and so on. For example, the LDP government relaxed work-hour rules by expanding the use of "discretionary work" with the 1998 and 2003 amendments to the Labor Standards Law. Regular workers in this category are supposed to have discretion in how to spend work hours but are not entitled to any overtime pay except when working on weekends and national holidays and late at night. While these regular workers are supposed to have job autonomy in terms of work hour allocation, this is often not the case. Instead, the expansion of discretionary work has enabled employers to use regular workers more flexibly and pay lower salaries.

Most recently, the LDP government introduced '"highly-professional work" in the 2018 Work-style Reform. Highly-professional work is further deregulation of work-hour rules, and regular workers in this category are not entitled to overtime pay under any circumstances. While the Work-style Reform also introduced the maximum legal limit on overtime work, the limit is still high (80 hours per month on average in any six months), and it is unlikely to significantly reduce the number of *karōshi* (death by overwork) and *karō jisatsu* (suicide due to mental health problems caused by overwork). Regular workers have also been under the continuous threat of being replaced by an increasing number of non-regular workers. This has enabled employers to put regular workers under pressure to work harder in poor conditions.

> **Labor unions and deregulation**

The neoliberal labor market deregulation implemented by the LDP government has also undermined the power of labor unions by increasing the number of non-regular workers, as it is more difficult for labor unions to organize non-regular workers. This has contributed to declining union density, which is currently at around 17%. The loss of access to the policymaking process in several Cabinet councils, as mentioned above, has also reduced the power resources of labor unions.

In addition, the conflicts of interest in labor market deregulation among unions have contributed to the decline in their power resources. Mainstream enterprise unions in internationally competitive sectors such as automobile and (until recently) electronics have not necessarily opposed labor market deregulation. These unions have often formed cross-class coalitions with management to maintain the international competitiveness of their companies in order to protect the jobs of regular workers at the cost of non-regular workers. As a result, they have been indifferent to the work precarity of non-regular workers and the poor working conditions of an increasing number of regular workers, such as illegal dismissal, non-payment of salary, and long working hours.

In contrast, individually-affiliated unions, which any individual workers can join irrespective of their company affiliation, have fought more aggressively against employers to represent the interests of individual workers who suffer from work precarity and poor work conditions. These unions represent the interests of non-regular workers and regular workers in small- and medium-sized enterprises (SMEs) who are not organized by enterprise unions; they aim to resolve individual labor disputes. However, the power resources – both human and financial – of individually-affiliated unions are much fewer than those of enterprise unions.

To compensate for a lack of power resources, some individually-affiliated unions have engaged in "social movement unionism" by forming coalitions with civil society organizations. For example, *Shutoken Seinen Union* (SSU, Tokyo Metropolitan Youth Union), an individually-affiliated union specialized in representing the interests of young workers, participated in a campaign called "Fight for 1,500 yen" organized by a civil society organization, *Aequitas* (meaning "fair" in Latin), to urge the government to raise the minimum wages for the working poor. However, such coalitions are often on an ad-hoc basis and are not institutionalized enough.

Individually-affiliated unions have also attempted to exercise political agency in the form of political lobbying, policy proposals, mass protests, and so on. For example, SSU made policy requests to relevant ministries such as the Ministry of Health, Labor and Welfare to improve the work conditions of young workers in terms of such things as minimum wages, job protection, and working hours. However, with a small number of exceptions, the political actions of individually-affiliated unions have hardly had significant impact on the government's labor policy. Individually-affiliated unions have had difficulty in organizing workers, as they usually recruit members on an individual basis through labor consultation rather than relying on conventional mass recruitment in the workplace. As a result, many individual workers still suffer from work precarity and poor work conditions. ■

Direct all correspondence to Hiroaki Richard Watanabe
<hrwatana@fc.ritsumei.ac.jp>

13

> Indonesian Workers' Resistance
to Suharto's Regime

by **Verna Dinah Q. Viajar**[1], University of the Philippines Diliman, Philippines

Indonesian unionists were demonstrating across the country in August 2020 against government plans to erode labour rights. Credit: IndustriALL Southeast Asia.

As is often said, those who cannot remember the past are doomed to repeat it. History gives us lessons as we grapple with the rise of authoritarianism around the world amidst the crippling crises of neoliberalism and the political-economic inequalities of our time. It may be helpful here to study the trade union movements in Southeast Asian countries that have confronted repression from authoritarian rule during the postcolonial and Cold War period. One such example is the Indonesian labor movement. The Indonesian labor movement was forged in the anti-colonial movement against the Dutch, persecuted during Suharto's authoritarian regime, and then emerged resurgent in the democratization process in the post-Suharto period. Even though weak, the labor movement during Suharto's repressive regime rose to the challenge of contributing to the regime change and democratization process. This article argues that trade unions and other labor-based movements in Indonesia, formed in defense of workers' interests, represented key elements in the struggle for democratization against the Suharto authoritarian regime. Understanding the role of organized labor in the movement towards democratic reforms and regime change in Indonesia may provide insights into how social forces emerge and consolidate resistance against authoritarian practices within and beyond Indonesia.

> The early labor movement

Trade unions were allowed to exist and blossom under the Dutch colonial government in Indonesia since 1894. The trade union movement increased to more than 100,000 workers and developed into a militant, left-wing, and pro-independence movement in the 1940s. Sukarno, the first president after independence (in power from 1945 to 1967) was considered a socialist revolutionary, and inherited a radically politicized labor movement, a strong communist party (Partai Komunis Indonesia or PKI), and an increasingly right-wing military organization from which Suharto came. As a result, during Sukarno's government, the left-leaning trade unions were caught in the political conflict between the Indonesian communist party and the right-wing military. To counter the communist influence under the Sukarno government, Suharto seized power in a coup d'état in 1968.

Termed as among the bloodiest exterminations of the communist movement in the region, Suharto's New Order

>>

14

regime was founded on the killing of an estimated 500,000 and the arrest of more than a million, identified as members of or sympathetic to the PKI. Caught during the implosion of the political conflict, the militant and left-wing trade unions were also wiped out by the military to ensure the stability of the Suharto authoritarian regime. A repressed and state-sanctioned labor movement emerged from the ashes of one of the bloodiest coups in Southeast Asia. This repression and control of the trade union movement became the pre-requisite to establishing Suharto's authoritarian rule (1968-1998) in the largest Islamic country in the world.

> Labor repression and state-sanctioned Pancasila[2] industrial relations

For more than two decades, Indonesian organized labor remained within the control of the Suharto authoritarian regime, justified under the Pancasila Labor Relations. Later renamed as Pancasila Industrial Relations, this framework extoled the Indonesian-based culture of seeking harmony within a community, such that class conflict between workers and capitalists was considered un-Indonesian and as acting against the tenets of Pancasila. Application of such a framework identified any form of labor protest, especially labor strikes, as violating the principles of Pancasila and instigating disharmony.

Pancasila industrial relations supported Suharto's economic strategy of lifting Indonesia out of the list of poorest countries in the Southeast Asian region. Suharto's New Order jumpstarted Indonesia's industrialization through an import-substitution strategy in the 1970s supported by revenues from oil; it shifted to an export-oriented growth strategy in the 1980s after the oil crisis in the late 1970s. The strategy resulted in rapid economic growth from the 1980s until the Asian financial crisis in 1997. A docile trade union movement in a low-wage labor market regime was needed for this growth. However, the rapid industrialization gave birth to new social forces, to industrial workers who demanded more freedom to organize, collectively bargain, and resist violence against trade unionists. Labor violence and exploitative working conditions under the export-oriented industrialization strategy produced a new industrial working class dissatisfied with the inactive and state-controlled labor organization. Independent trade unions began organizing in the early 1990s, with wildcat strikes heralding the shift towards a competitive labor movement.

The series of labor strikes and protests in 1994 contributed to the tumultuous anti-authoritarian *reformasi*

Credit: IndustriALL Southeast Asia.

movement that culminated in Suharto's ouster during the Asian financial crisis. Even though organized labor and the *reformasi* movement did not arrive at a formal collaboration, Indonesian workers and unions provided input, even if indirectly, to the democratization movement that brought about regime change. Trade unions or organized labor, and other labor-based/workers' movements formed in defense of workers' interests, are all part of the Indonesian labor movement. This labor movement was strengthened when linked with the broader democratization movements against Suharto's authoritarian regime.

> Conclusion

The Indonesian labor movement has undergone and evolved into distinct faces and phases influenced by changes in political and economic contexts. Trade unions were weakened in Suharto's repressive labor regime but contributed to regime change when workers demanded democratic rights such as freedom of association, rights that can only flourish in a democratic environment. Changes in production relations gave birth to new social forces, such as the industrial working class, urban professionals, and worker-based interest groups that formed part of the broader democratization movement. Workers' and student movements formed part of the backbone of the anti-Suharto movement after the shocking 1997 Asian financial crisis. Indonesia witnessed the most dramatic collapse of a government and ouster of an authoritarian leader when Suharto was forced to resign in 1998, as military tanks surrounded his residence in the middle of the night. The fall of Suharto's New Order government, propped up by a nationalist Pancasila ideology, signaled the beginning of a new era of politics for Indonesia. ◼

Direct all correspondence to Verna Dinah Q. Viajar <vqviajar@up.edu.ph>

2. *Pancasila* is a political framework initially forwarded by colonial independence leader, Sukarno, to unify the country. It is founded on the principles of humanitarianism, democracy and social justice. Suharto appropriated this popular political idea to gain legitimacy.

15

> Futures of Gender Regimes

by **Sylvia Walby**, City, University of London, UK, co-coordinator of ISA Thematic Group on Violence and Society (TG11), and member (and former President) of ISA Research Committee on Economy and Society (RC02), and Women, Gender and Society (RC32) and **Karen Shire**, University Duisburg-Essen, Germany, and Vice-President of ISA RC02

Gender matters at a global level. This set of papers addresses new thinking about gender relations at the macro level needed to analyze the global. They debate the best way to theorize varieties of gender regime. They add an intersectional lens to the analysis of class that has, so far, been the main focus of macro-level analysis of the global in sociology. They add a macro level to the analysis of gender that has, so far, been predominantly analyzed at the micro and meso levels.

The papers develop from a debate held in _Social Politics_ in 2020 as to how theories of varieties of gender regime are to be developed to address the current crisis and to more rigorously include the Global South as well as the Global North. How is the impact of crises, especially the COVID crisis, on gender relations to be theorized? Are varieties of public gender regime different in the Global South as compared with the North?

How is modernity, or rather, multiple entangled modernities, gendered? How is the great transformation to modernity, a core issue in contestations in sociological theory, gendered? Are domestic forms of social relations inherently or contingently modern or premodern? Is the most important distinction in varieties of gender regime the one between domestic and public forms of gender regime? Is the distinction between neoliberal and social democratic varieties of gender regime found in the Global North generally applicable, or are there different distinctions between varieties of the public form of gender regime in the Global South?

The concept of gender regime challenges the traditional reduction of gender to the family. The gender regime is constituted by multiple institutional domains across society. The range of domains is debated: sometimes including economy, polity, civil society, and violence; while others include additional domains.

How is violence, widely recognized as important to gender relations empirically but rarely integrated into core sociological theory, to be addressed? Is violence a fourth institutional domain alongside economy, polity, and civil society? Theorizing gender at a macro level requires an answer to this question. Too often, the macro level has been theorized as an ungendered political economy. The papers here take different positions on this debate about the theorization of violence: some argue for the recognition of the significance of violence for macro-level thinking about the gendered global by treating violence as a major institutional domain, others for dispersing violence across other domains.

New developments in the organization of care challenge social theory that traditionally narrowed the economy to marketized forms of labor. Care work is part of the economy, whether paid or unpaid. The social relations of the economy include the domestic relations as well as those between capital and labor.

There are often multiple differently gendered polities co-existing (and competing) in the same territory: "national" state, EU (or other hegemon), organized religion (e.g. Catholic Church). They have different depths of gendered democracy, so variations in the balance of power between them are gendered.

Gender relations are being rescaled. Global gendered care chains require the analysis of the macro level as well as meso and micro. They require analysis of the intersection of capitalism and varieties of gender regime; of migration; and of specifically gendered challenges to methodological nationalism. There is no bounded nation-state society in which all social domains are aligned. The rescaling of gender relations also involves the local (new forms of care provision, new forms of political project), and (would be) hegemons (the EU and China, as well as US). The papers offer different ways of thinking about trajectories of gender regimes over time and space, as differently gendered forms of combined and uneven development.

One of the substantive challenges this set of papers addresses is that of whether the COVID crisis is driving

>>

"The concept of gender regime challenges the traditional reduction of gender to the family. The gender regime is constituted by multiple institutional domains across society"

changes in the gender regime. On the one hand, there are sickness, unnecessary deaths, and processes of de-democratization. On the other, there are new forms of solidarity and progressive projects.

The papers address these themes. Sylvia Walby sets out how violence can be theorized as a fourth institutional domain, and how different varieties of gender regime deploy and regulate violence. Karen Shire addresses how family policies characteristic of conservative gender regimes fail to fundamentally change the gendered division of care labor, in what is neither a liberal nor a social-democratic transformation. Mieke Verloo argues for specifying what we mean by family, arguing instead for a concept of how society organizes bodies, sexuality, and kinship. She views the "anti-gender" turn to the right as countering the de-traditionalization of intimate relations as seen in the attacks on reproductive rights and sexual autonomy in Hungary and Poland. Heidi Gottfried and Karen Shire address the rescaling of gender relations in a comparative regional analysis of trajectories of change in Japan and Germany. Valentine M. Moghadam argues that reversals of several feminist gains in Iran and Tunisia can only be understood if, drawing on world systems theory, we account for how countries in the interstices of economic peripheries and semi-peripheries are affected by economic crises and hegemonic powers. Reversals in women rights in Tunisia are attributed to the over-exposure of semi-peripheries to world economic crises, while the US-led sanctions on Iran are to blame for the reversal of gender gains in that country. Ece Kocabıçak analyses changes in the nature of the patriarchal state in the Turkish gender regime. The analysis of Italy and Spain by Alba Alonso, Rossella Ciccia, and Emanuela Lombardo shows that Southern Europe is not a unified region, with large differences in the two countries' gender regimes emerging from the interplay of polities and civil societies. Roberta Guerrina, Heather MacRae, and Annick Masselot theorize the EU as a distinctive gender regime, which has failed to address the gendered and racialized inequalities generated by the single market project, and exacerbated by multiple crises, the latest of which is Covid. ◾

Direct all correspondence to Sylvia Walby <Sylvia.Walby@city.ac.uk>

17

> Are New Varieties
of Gender Regime Emerging?

by **Sylvia Walby**, City, University of London, UK, co-coordinator of ISA Thematic Group on Violence and Society (TG11), and member (and former President) of ISA Research Committee on Economy and Society (RC02), and Women, Gender and Society (RC32)

Three issues need to be questioned and analyzed in light of the emergent varieties of gender regimes: violence, inequality in care and the concept of crisis. (Picture 1) Credit: aesthetics of crisis/flickr; (Picture 2) Credit: John Twohig/flickr; (Picture 3) Credit: aesthetics of crisis/flickr.

The identification of emergent varieties of gender regimes and the trajectories through which they have developed matters for gender relations and for society, as my colleagues and I have argued in the special issue of *Social Politics* in 2020. While most attention has been on increasingly unequal forms of gender regimes, there are also emergent practices that might be indicative of less unequal gender regimes. There have been pressures on some (but not all) societies that drive an increase in gender inequality; these pressures include COVID, Brexit, and Trump, as well as economic recession. There are also forms of collective response that drive a decrease in gender inequality, including state-based (e.g., public health) and non-state-based (e.g., feminism) forms. These raise issues of violence, care, feminism, and the intersection of gender and class. In the context of debates on varieties of gender regimes, what did these pressures and crises change or illuminate? What new distinctions, if any, do we need to make in the typology of varieties of gender regimes to encompass these changes? How are the processes leading to different trajectories through the domains of economy, polity, civil society, and violence best understood? What more is needed to theorize the changes taking place: is the concept of crisis and critical turning point sufficient, or are different temporalities and spatialities involved that require new concepts? Three broad questions may be identified.

First, to analyze increasing inequality, is "neoliberalism" a sufficient concept? How is the turn to the right and associated increases in inequality to be identified and theorized? Are concepts of "conservativism," "authoritarianism," or "fascism" needed? With regard to the increase in violence, the theorization of violence within the varieties of gender regime is posed anew. Is the characterization of the state as authoritarian needed, or can this violence still be absorbed inside the concept of neoliberal? Does the rise of private militias acting with the complicity of the state require a concept of fascism as a reference point, whether

>>

18

or not the sustained contestation from both civil society and within the state has been sufficient to prevent this possibility from being achieved? On COVID-19: Does the attempted restructuring of the political economy of health services in the direction of for-profit private firms require not only a concept of neoliberalism but a more engaged discussion of the intersectionality of gender with class?

Second, to analyze decreasing inequality: is social democracy enough to grasp emerging practice? Are there new forms of social democratic gender regimes that have a different relationship to a national state than the historic form in the Nordic countries? Do concepts need to distinguish between social democratic forms: polity, state, and non-state (commons, community, neighborhood, local) engaging different forms of collectivity and solidarity? On COVID: On the one hand, the COVID crisis shows yet again the significance of state-based forms of social democracy in the central role played by state-based public health in suppressing the virus. On the other hand, it is at the local state level that knowledge and action is needed to deploy effective testing, tracing, and support for isolation. The relative failure to address the transmission of the virus through the physical and social contacts involved in providing and receiving care has applied whether or not this care is unpaid or monetized, at least in Europe, suggesting that some distinctions in the gendered debates on care have surprisingly little traction for COVID. This raises a number of questions: What implications do feminist interventions on the provision of care have for the gender regime? How might we theorize emerging practices in care relations? What would the theorization of spatiality and scaling in gender regimes look like?

Third, on crisis: Is a typology of outcomes of crisis (recuperate, intensify, transform, or catastrophe) sufficient? Is the conceptualization of the key moment as a potential critical turning point sufficient? How is the uneven impact of feminism to be understood? The critical turning point, or tipping point, into a new path-dependent trajectory is usually conceptualized as an "event," largely on the basis that it has a short temporal duration and concentrated spatiality. Three alternative formulations that offer further differentiation are possible: "cascade," "catalyze," and "wave." In the concept of cascade there is reference to a sequence of crisis points in which the crisis may or may not cascade through the social systems of society; this has been used for the 2008 financial crisis and 2020-21 COVID-19 crisis. In the concept of catalyze, there is reference to a slightly longer duration than is usually encompassed by the concept of event; it contains the idea of acceleration, linked to notions of spiral, in addition to sequence and cascade, which has been used to capture the development of social democratic forms of public gender regime in the middle of the twentieth century in Nordic countries. In wave, there is a dynamic force of change (e.g., global feminism) affecting more stable institutional forms, in which the outcome depends on the interaction between them, drawing on the concept of "rounds of restructuring," which offers improved spatial as well as temporal nuancing of the changes.

The three issues noted above offer engagement with the debates on varieties of gender regimes in *Social Politics* in 2020 and with contemporary societal developments. ■

19

Direct all correspondence to Sylvia Walby <Sylvia.Walby@city.ac.uk>

> All in the Family:
Conservative Gender Regimes

by **Karen Shire**, University of Duisburg-Essen, Germany, and Vice-President of ISA Research Committee on Economy and Society (RC02)
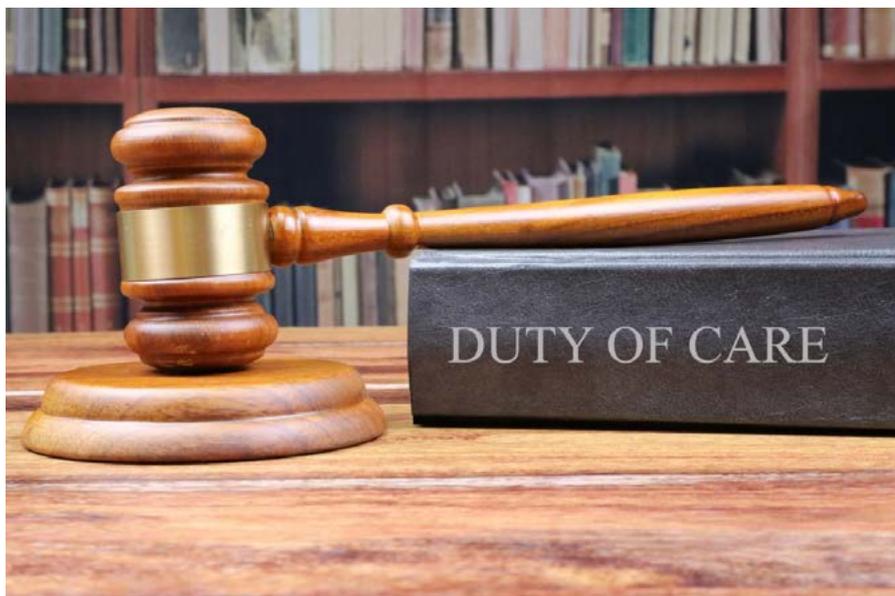
Who has the duty to care, when the issue of reducing women's care burden has been formulated as family *policy, and the support of women in families as enabling a better* work-*family* balance? *Credit: Nick Youngson /Creative Commons.*

Gender regime theory envisions two ideal-type trajectories for the development of public gender regimes. The first is a neoliberal trajectory, where opportunities for women to gain an equal position with men are opened by their equal access to competitive markets. This trajectory largely ignores the ways in which the gendered division of unpaid labor and the gendered segregation of labor disadvantages women. Social-democratic trajectories establish gender equality as a goal of all policies, most significantly, care policies and other social protections that equalize employment protections and guarantee women equal participation in political and economic leadership.

In terms of real cases, the US comes closest to the neoliberal gender regime, and Sweden to the social-democratic ideal. Both cases are similar in another respect – the development of their gender regimes are embedded in democratic paths to modernization. In a contribution to the *Social Politics* (2020) special issue on varieties of gender regimes, Kumiko Nemoto and I argued that the ideal types based on historical experiences of democratic modernization ignore the particularities of countries undergoing authoritarian modernizations. In our analysis of the historical constitution of gender regimes in two cases of authoritarian modernization – Germany and Japan – we argued that family codes were key in subordinating women

within male-led households and establishing the family-household unit as a public social institution situated in the service of nationalist and militarist interests. Similar arguments about the legal embedding of gender hierarchies in the family are made in the same *Social Politics* special issue for other cases of authoritarian modernization in the MENA region (Moghadam), Turkey (Kocabıçak), and Spain (Alonso and Lombardo).

> ## > Family policy in Germany and Japan

Reforms to family codes in Germany and Japan during the democratizations following military defeat and foreign occupations in 1945 established domestic gender regimes largely on the liberal-market model of the US, but not completely. The gender hierarchies within the family household as the subsidiary unit of the nation was reconstituted in welfare and employment policy, in what gender scholars have called the male breadwinner model. The second-wave feminist movement in the 1970s achieved the reform of many remnants of the conservative family formation, for example in inheritance and divorce law. What have remained, however, are the responsibility of the family household for care and the tax and social policy supports for the male breadwinner family form. While no longer authoritarian, these gender regimes remained conservative well into the 2000s, when concern with rapid aging, low

>>

fertility, and declining labor supplies aligned conservative political policies with social and liberal democratic forces to reform the social organization of care and improve women's employment rates.

The Swedish social-democratic gender regime was not, however, the model for these reforms; nor, I argue, could it be. Like many continental European countries, social welfare in Germany and Japan is financed through income deductions to social insurance, and protections are extended to dependent family members. This welfare mix continues to make women in families available for unpaid care. It also makes the Swedish solution of tax funding and public facilities politically unfeasible. Instead, the issue of reducing women's care burden has been formulated as *family* policy, and the support of women in families as enabling a better work-*family* balance. In both countries, family policy has intervened into the social reorganization of child- and elder-care. In neither, however, has family policy socialized care as in Sweden, or upset the gendered division of unpaid care labor.

What has family policy accomplished? The gendered logic of family policy becomes evident when the focus is on the most acute forms of care – of infant children, and of elderly who can no longer live on their own independently. In both Germany and Japan, family policies have kept both forms of *care all-in-the-family*.

Programs to expand early childcare have failed to cover the majority of children between the ages of one and two. In Germany, where EU pressures led to reforms, the slow expansion in care for this age group (to 34% coverage) was accomplished by measures to expand the provision of care by "day mothers," reinforcing the role of women – albeit in other families – in the care of young children. In Japan, women are now allowed to extend their maternal leaves beyond one year if they remain on a waiting list for a place in a childcare facility.

In elderly care both countries introduced long-term care insurance over 20 years ago. The new markets created for eldercare services, however, are explicitly aimed at supplementing rather than socializing care provided by family members. State support for expanding private market services rather than socializing care suggests a neoliberal trajectory of change in gender relations.

> ### > The search for a feasible social-democratic alternative

Is there no alternative to the neoliberal public gender regime? The search for an answer concerns alternatives to the Swedish form of social-democratic gender regimes. In this search, at least the starting point is clear: the de-traditionalization and erosion of the conjugal/biological family as a basic unit of social care through a social reorganization of intimate relations and a new moral economy of care informed by the goal of gender equality.

In Germany and Japan, harkening back to experiments in reorganizing intimate relations in the 1968 student and feminist movements, there is evidence of a creative capturing of state subsidies and insurance premiums to create alternative forms of child- and elderly-care outside the family. In Germany, cooperatives of day mothers, along with day father care in rented spaces, and elderly co-living situations where seniors pool their insurance premiums to hire their own caregivers are examples. In Japan, women-led nonprofits providing high quality care and decent work to paid women and increasingly also men as caregivers are increasingly visible in elderly care, but also in early childcare.

The search for a feasible social-democratic alternative for modernizing gender relations in the conservative gender regimes is likely to begin with *the end of the family* as we know it. ∎

Direct all correspondence to Karen Shire <Karen.shire@uni-due.de>

21

> Can We See a Gender Regime Transformation in Europe?

by **Mieke Verloo**, Radboud University, Netherlands

The hashtag #piekłokobiet (hell for women) has become a symbol for the protest against the new laws restricting access to abortion in Poland. Credit: LukaszKatlewa /*Wikimedia Commons*.

The last decade has seen a speeding up of anti-gender campaigns. These are spreading out across Europe, increasing the number of actors involved and the range of issues crucial for feminist futures; we also see a worrisome shift from reactive to proactive strategies. These campaigns can be observed to target a specific set of feminist issues, notably those prioritized by the radical feminist strand of the 70s feminist project: de-essentializing sex and gender, bodily and sexual autonomy, reproductive rights, and heteronormativity. All this is in the context of growing authoritarianism across Europe. The new book by Agnieszka Graff and Elżbieta Korolczuk discussing Anti-Gender-Politics in the Populist Movement offers a great analysis of this phenomenon. I explore whether these attacks signify a transformation of gender regime in Europe and require an extension of gender regime theory.

In Walby's gender regime theory, gender regimes are complex systems of inequality, distinct in how specific configurations of the polity, economy, violence, and civil society domains impact on gender inequality. She distinguishes between domestic and public gender regimes, and within the public gender regime, between neoliberal and social democratic forms. The distinction between domestic and public gender regimes is based on differences in the polity: the polity in domestic gender regimes is characterized by a weak state and a strong role for male patriarchies based in families and kinship networks, while in public gender regimes, it is characterized by a strong state. The further distinction between the two public gender regimes is then made based on how states or state institutions organize class inequality. In the case of the public neoliberal gender regime, state institutions give as much space as possible to the market, and hence to a capitalist system of organizing the economy, resulting in strong class inequalities, and shaping gender inequalities intersected by them. The public social democratic gender regime is set up to mitigate the worst excesses of capitalist class inequalities, towards a certain base level of equality of opportunities. Gender inequalities, especially around labor and care, are part of this mitigation.

>>

22

This distinction of gender regimes is based predominantly on the domains of the polity and the economy. Yet, to understand anti-gender campaigns and the emerging gender transformation linked to it, gender regime theory would have to pay more attention to the entanglement of gender inequality and sexual inequality. I argue that it is possible and necessary to amend gender regime theory by adding a cathexis domain consisting of all institutions in society regulating bodies, sexualities, and kinship.

My arguments are linked to four critiques of gender regime theory (see the Gender Regimes Special Issue of Social Politics 2020), centering on the need to give a place to "family" in Walby's framework and presenting different ways in which to do that.

> The family as a domain in gender regime theory – possibilities and limits

Valentine M. Moghadam identifies two public gender regimes: neopatriarchal versus conservative-corporatist. The neopatriarchal gender regime is domestic patriarchy organized by the state through conservative family law, combined with a form of capitalism that limits female economic participation, restraints on civil society that impede sustained feminist organizing, and inadequate or non-existent legislation on violence against women. The emerging conservative-corporatist regime shows strong feminist movements, visibility of women in the professions, and reformed family law. Adding family as a domain is necessary, she argues, because family laws and reforms are the pivotal institutions for how these gender regimes emerge and transform. Importantly, she pays attention to various non- or less-democratic positions in the polity and in civil society.

Karen Shire and Kimiko Nemoto, drawing a distinction based on the democratic or authoritarian nature of the polity, also stress the important role of family policies. They observe that conservative gender regimes constitute the domestic as a public sphere and transform through family policies, which reinforce a gendered division of labor that is neither neoliberal nor social democratic. These family policies combine supporting women's employment with improving fertility rates. They show that domestic gender regimes can be modernized in a non-liberal, conservative way, featuring not just the organization of labor and care, but also the control of women's fertility. Similar to Moghadam, they distinguish gender regimes on the dimension of democracy versus autocracy, linked to different pathways to change: top-down in authoritarian regimes, and bottom-up in democratic ones.

Ece Kocabıçak similarly argues for more attention to the significance of family during the shift from a domestic to a public gender regime, through gender-based dispossession in sustaining the patriarchal exploitation of labor within the family. She observes a modern domestic patriarchy organizing women's exclusion from paid employment, along with dispossession and increasing wage dependency, thus maintaining the domestic patriarchal exploitation of labor.

Emanuela Lombardo and Alba Alonso also see a need to theorize a cathexis domain because sexual and reproductive struggles in Spain have a crucial relevance for understanding gender regime dynamics. Those struggles are at the heart of anti-gender campaigns, and hinder a further transformation of gender regimes in a more feminist direction; they could reverse the gains made in the recent past.

All these authors try to fit "family" issues into Walby's four current domains, but get into difficulties because families are mostly centered on the labor-care division. This however, is insufficient to cover those dimensions of gender inequality that have roots in how a society organizes bodies, sexuality, and kinship.

Summarizing, the current articulation of varieties of gender regimes as between public neoliberal and social democratic gender regimes is not enough to get a grip on current anti-gender campaigns and the resulting turn to less progressive forms of gender relations. This turn has happened already in Poland and Hungary, by restricting reproductive and sexual autonomy and blocking sexual rights for relationships and family building; it is quickly diffusing to other countries and across a wide variety of political actors. There is a strong coalition of orthodox religious and far-right actors pushing for this transformation. Is it a modern public form of neopatriarchy?

This is a serious gender regime transformation, but one that becomes visible in all its ugliness only when we articulate a new full-fledged domain centered on bodies, sexuality, and kinship. ■

Direct all correspondence to Mieke Verloo <mieke.verloo@ru.nl>

23

> Public Gender Regimes: Converging Divergences

by **Heidi Gottfried**, Wayne State University, USA, and board member of ISA Research Committees on Economy and Society (RC02), Labour Movements (RC44), and Women, Gender and Society (RC32), and **Karen Shire**, University Duisburg-Essen, and Vice-President of ISA RC02
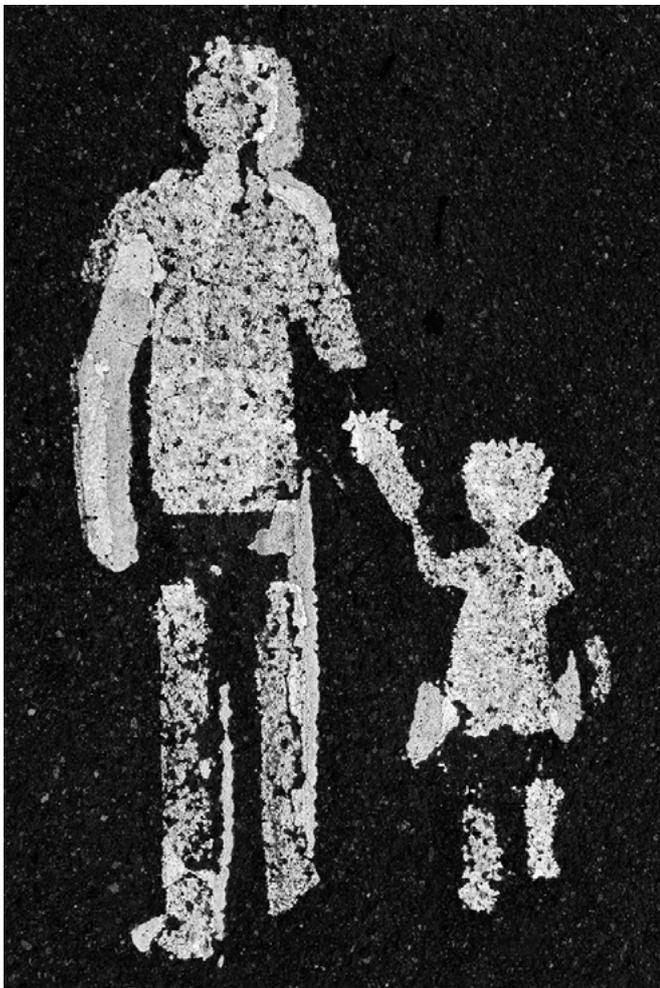
Although the regional reorganization of reproduction in Japan and Germany varies in important ways, migrants play an important role for care work arrangements in both states. Credit: Pekka Nikrus /flickr.

In the wake of Germany and Japan's high growth miracles and economic expansion women advanced in higher education, yet changes in their employment patterns remained limited, punctuated by high levels of part-time work among mothers, persistently large gender pay gaps, and continued burdens of unpaid care; a pattern that was exacerbated during the pandemic. Recent policy initiatives aimed at the organization of care are resulting in "converging divergences" between contemporary gender regimes in a world reconfiguring social reproduction on a global scale, while simultaneously creating new divides among women in the transformation of the gendered division of reproductive labor. The increasing demand for low-wage migrant labor, especially for rapidly aging countries, yields a stronger regional and global integration of social and political economies, and concomitantly a tighter intersection of inequalities along class, gender, and race/citizenship.

> Restructuring care work

Germany and Japan continue to situate infant childcare primarily in the private household, and reforms have failed to adequately expand infant care facilities. Declining fertility in both countries, partially a function of the tightly woven male-breadwinner employment system, has generated rapid shifts in the aged population, and with it, increasing demand for elderly care. The newest additions to social policies in both countries are long-term insurance schemes, which in largely similar fashion clearly relocate eldercare in the private household. The partial funding for services through insurance premiums in both countries contributes to encouraging the expansion of care services in the form of low-wage and semi-professionalized labor.

Across the European Union (EU), under pressures of the European employment strategy and its gender targets,

>>

childcare has largely become more socialized, at least for children older than three years. Care for children under the age of three, however, is largely still a family matter. The lack of evident changes in men's behavior in domestic labor fuels attempts within the EU to shift more of women's unpaid domestic labor into paid market services. Moreover, regardless of whether a gender regime is characteristically social democratic or not, a large share of paid domestic and care labor is relegated to migrant women, in overwhelmingly low-paid and precarious employment conditions. Divergence in this context affects the employment conditions of women, with a clear divide between citizen and non-citizen women's labor, along which varieties of gender regimes increasingly converge. The social reorganization of reproduction tied to the exit of women from the domestic sphere to enter paid employment in larger numbers, and *family* policies (like tax credits for hiring domestic help) aim at promoting women's labor force participation as a strategy of national growth in the context of demographic changes. Thus, growth strategies are tied ever tighter into a supra-national, regional integration of reproduction.

> **Regional variations**

The regional reorganization of reproduction, within the Asia-Pacific in the case of Japan, and the European Union for Germany, varies in important ways. The freedom of services and the freedom of mobility in the European Union have created thoroughly liberalized infrastructures of trade and labor mobility, though evidence showing that Eastern European migration played a role in the German care sector well before it was possible for citizens of the new member states to work legally in Germany suggests functional equivalents rather than fundamental differences. ASEAN countries are lifting barriers in some sectors of skilled labor mobility between their member states, yet the zone operates on a different order than the European Union. Japan has relied on bilateral agreements to effect a similar dynamic of rescaled reproduction. Mobilizing trade agreements, in the lingo of Economic Partnerships, Japan has generated new corridors of care labor mobility; in fact, care labor is the main target of the migration clauses in these agreements. The most prominent source countries, the Philippines, Indonesia, and Vietnam, graft onto prior regional links based on a history of Japanese colonization, Japan's political influence as the leading donor nation in the region, and its position as the largest foreign investor.

Diverging from Germany, Japan has embarked on a cautious approach to expand the number of migrant care workers by negotiating bilateral agreements and varying the classification of care work as skilled or unskilled. Its labor importing strategy has not filled the perennial labor shortage of care workers, in part because strict controls on immigration, the high hurdles to securing a license, and the limits on pathways to citizenship constrict the flow of migrant labor into Japan. Following its old playbook, the Japanese state interjected itself at the center of intermediation, acting not only as a rule-setting agent in negotiation of bilateral agreements but also as a labor market intermediary managing the movement of labor from other countries in the region. Free mobility in the European Union eases the cross-border flows from countries abutting Germany. Early restrictions meant that migrant care labor entered Germany either as self-employed (under the freedom of services in the EU) or as unregistered workers. At this early stage, migrants worked in private households, either without coverage of labor standards (if self-employed) or without any recourse to complaints (if unregistered). As in other EU member states, the way care labor has entered Germany has allowed a sector of agency services to thrive (located mainly in Eastern European member states). Lifting of restrictions has left care workers in precarious forms of self-employed/brokered service relations. In these ways, migrant care labor has been fashioned as a precarious employment form.

Regionalization and globalization can be positive forces, to the extent that they present new arenas for feminist actors in governments and society in their effort to mobilize effective movements for aligning gender equality policies to internationally based standards. Still, policies formulated at regional and international levels must be enacted by national political actors. Underlying tensions between supra-national institutions and national governance prevent easy harmonization of policy initiatives across countries, which became acutely evident from governments' national responses to COVID. Crises, like COVID-19, create the potential for consequential change to social systems: new public recognition might result in revaluing care work and tilting policies toward social democratic principles or the intensification of care labor in the household may amplify the re-traditionalization of women and inequalities based on class, race, and citizenship. ■

Direct all correspondence to Heidi Gottfried <ag0921@wayne.edu>

25

> Gender Regimes, Polities,
and the World-System

by **Valentine M. Moghadam**, Northeastern University, USA, and member of ISA Research Committee on Women, Gender, and Society (RC32)

As a macro-level sociological concept formulated by Sylvia Walby, *gender regime* has been theorized and analyzed largely at the national level and applied predominantly to regions characterized by highly economically-developed capitalist democracies that are strongly integrated into the capitalist world-economy and its financial markets. To date, the country case studies include the United Kingdom, United States, Spain, Japan, and Germany. We are, however, beginning to see application to less-developed regions that are home to both democracies and authoritarian polities, either weakly integrated into the world-economy or highly dependent. Here I focus on Iran and Tunisia and begin with some background and context.

Application to Israel (by Amalia Sa'ar), Turkey (by Ece Kocabıçak), and the Maghreb countries of Algeria, Morocco, and Tunisia (by the present author) shows that the concept of gender regime can be extended to non-Western contexts, albeit with the necessary adjustments to account for national-level specificities and within-country variations. Sa'ar deploys the concept of the "patriarchal gender contract" (which I introduced in a 1998 book) to describe Palestinian-Israeli women's stalled labor-force integration into the neoliberal economy; the result in Israel is a predominantly domestic-centered gender regime, with smaller-scale, public-centered types operating alongside. Kocabıçak argues that domestic gender regimes in Turkey vary between premodern and modern forms, both over time and by subnational region. Aili Mari Tripp does not use the concept of gender regime in her recent book, *Seeking Legitimacy,* but her comparison of the Maghreb countries of Algeria, Morocco, and Tunisia with other Middle East/North African (MENA) countries confirms my discussion of the shift from a "neopatriarchal" to an emerging "conservative-corporatist" gender regime in that MENA subregion. Rania Maktabi, while not drawing on gender regime theorizing, discusses gendered citizenship regimes, differentiating North Africa, the Levant, and the Persian Gulf sheikhdoms. In my own work, I have raised the question of non-Western or non-capitalist modernities (e.g., under Communism or in authoritarian settings) in addition to focusing on emerging gender regimes in newly democratizing Maghreb countries, especially Tunisia, and more recently Iran.

In all cases, feminist theorizing has drawn attention to both progress and stagnation, if not regression, in the evolution of patriarchy and the established gender regimes. A question that arises, therefore, is whether gender regimes are not only constituted by national-level institutional domains and class structure, but also shaped by the economic zone within which they are located – core, periphery, and semi-periphery – as elaborated by world-systems scholars. Theorizing gender regimes at this scale might be a first step in identifying varieties, dynamics, and prospects; diffusion and clustering; convergences and divergences; and drivers of change and regress.

> Global South gender regimes – conceptual issues

To extend application beyond the Global North, I highlight three conceptual issues. One pertains to the nature and extent of the persistence of private patriarchy (domestic or pre-capitalist gender regime), the appropriate name for the emerging or established gender regime (conservative vs neoliberal or social-democratic), and the continued salience of *family* as an institutional domain.

A second pertains to scale. In a recent article on Iranian Kurdistan that I co-authored with two Kurdish-Iranian sociologists, which focuses on the capital city of Sanandaj, *family* remains a significant institutional domain within the broader – and far more centralized – national-level neopatriarchal gender regime of Iran. Do institutional domains operate differently at different scales?

A third issue concerns the drivers and actors behind the shift from one gender regime to another, and the factors behind stagnation or regression. For example, in my work on shifts in the gender regime in the Maghreb, I identify *feminist mobilizations* as key drivers of change, but I note that further progress – especially in democratizing Tunisia – has been hampered by economic crisis.

>>

26

> "*The capitalist world-system should be the conceptual entry-point for our understanding of gender regime prospects and dynamics, including institutional configurations at different scales*"

The three delineated issues are interconnected, in that drivers and actors may be present at various scales, and institutional domains may be influenced by global as well as national and subnational dynamics. My core argument is that the capitalist world-system – understood as the highly unequal and hierarchical configuration of capitalist markets and interstate relations – should be the conceptual entry-point for our understanding of gender regime prospects and dynamics, including institutional configurations at different scales.

> ### > Gender regimes in Iran and Tunisia
> ### – applying world-systems analysis

I explore these interconnections with an empirical focus on two MENA republican polities with large middle classes, including educated and aspirational female populations. One is authoritarian and oil-rich but subject to punishing U.S. sanctions (Iran); the other is democratizing but economically depressed and heavily indebted (Tunisia). They have different polities, economies, and civil societies but similar debates around *family*. The institutional domains, as well as the respective gender regimes that are constitutive of them, are not only shaped by internal factors and forces but also are highly susceptible to forces that operate at the level of the hierarchical world-system.

Gender regimes, I argue, are products of world-systemic processes that affect actors and institutions within and across national borders, enabling or impeding gender equality. In Iran's case, an emergent semi-peripheral state challenges the world-system's hegemon, incurring economic and financial penalties that in turn strengthen domestic right-wing forces and impede or reverse progress on women's participation and rights. This includes a recent, highly contested official decision to release children's reports cards only to fathers. In Tunisia's case, a widely admired democratic transition and emergent gender regime moving in an egalitarian direction is imperiled by the country's small economy, tangential links to global commodity chains, and dependence on external investments and loans. This includes the deadlock and inaction around equal inheritance for sisters, hugely disappointing to feminist activists, and a recent controversial presidential intervention in the polity. The analyses of Iran and Tunisia, two cases of Global South countries at the interstices of periphery and semi-periphery, elucidate the influence of world-systemic processes – the politics of hegemony within the interstate system, and the vulnerable status of smaller economies within the world-economy – on gender regimes. ■

Direct all correspondence to Valentine M. Moghadam <v.moghadam@northeastern.edu>

27

> The Determinants of
the Turkish Patriarchal State

by **Ece Kocabıçak**, The Open University, UK

Women and LGBTI+ communities protesting Turkey's withdrawal from the Istanbul Convention originally introduced to protect girls and women from all forms of violence. Kadıköy, 2021. Credit: Yagmurkozmik /Wikimedia Commons.

Along with stressing the equal significance of the gender-, class-, and ethnicity-based inequality regimes for social transformation, theories of the varieties of gender regime allow for an assessment of changes within the patriarchal character of the state. This paper extends gender regime theories by examining the determinants of the patriarchal state in Turkey. The case of Turkey's withdrawal from the Istanbul Convention, a human rights treaty addressing violence against women and domestic violence, enables an investigation of how far the interplay between multiple state agendas and the de-democratization process increases the collective bargaining capacity of men, as a gender-based socially constructed group.

> Two forms of patriarchal state character

Building on gender regime theories, I suggest that the gender-, class-, and race-ethnicity-based dominant groups of society establish a strong influence over the state, and as such, lead to an interplay between multiple state agendas. According to Sylvia Walby, the predominance of gender-based exclusionary strategies is tied to the domestic form of gender regime, and gender-based segregation and subordination are linked to the neoliberal or social-democratic forms of public gender regimes. Drawing on her differentiation, I conceptualize two major forms of patriarchal state character: *the domestic patriarchal state* confines women's labor to household production (including care work), where-

>>

28

as *the public patriarchal state* utilizes various degrees of commodification and decommodification (of goods and services produced by women within the home) to guarantee the sustainability of women's double burden of paid and unpaid labor. While the former sustains gender-based exclusionary strategies, the latter regulates gender-based segregation and subordination within the institutional domains of economy, polity, civil society, and violence.

The proposed framework is particularly relevant for the analysis of state formation in the Global South, as the political actors are comprised of diverse groups. As I have argued elsewhere, the patriarchal political actors in Turkey are not limited to male heads of household, but also include male small producers in rural and urban areas. Moreover, under the conditions in which anti-democratic regimes maintain considerable gender gaps in public decision making, a particular group of elite men sustains its influence over the leadership of the regime. This, in turn, increases the bargaining capacity of men. I develop the concept of *men-of-the-regime* in referring to this group of elite men.

My data analysis suggests that since the 2000s, the Turkish state has contained a clash between its public and domestic patriarchal characters. These conflicting characters can perhaps be found in many other states, but in Turkey the shift towards a public patriarchal state has remained limited and its scale insufficient to challenge the predominance of its domestic patriarchal character. State interventions in the domain of economy encourage urban women with relatively lower levels of education to stay at home and provide unpaid care, as well as keeping rural women as unpaid family workers in small-medium scale farms. Within the domain of civil society, the recently established anti-democratic regime (since 2014-15) excludes women from public decision-making and political representation and suppresses social movements; at the same time, women's control over their sexuality, including their reproductive abilities, is restricted by the state-driven homophobic and pronatalist regulations. A closer look at state interventions in the domain of gendered violence shows that the state traps women within the confines of the violent heterosexual family setting by limiting women's access to viable alternatives and tolerating male violence against single, separated, or divorced women as well as violence against LGBTQ+ people.

> Turkey's withdrawal from the Istanbul Convention

By focusing on Turkey's withdrawal from the Istanbul Convention, I investigate the extent to which the patriarchal actors have utilized the Turkish Muslim racist state agenda to maintain the domestic patriarchal state character. My

assessment suggests that initially, between 2015 and 2018, certain groups of men became organized against the legal regulations prohibiting child marriage, securing alimony, and regulating custody of children. Law No. 6284, which was enacted in relation to the Convention, was also scrutinized during this time period. By establishing various discussion groups on social media, running disinformation campaigns, and organizing street protests, these groups claimed that they were the victims of the above regulations. Their initial campaigns were also supported by men-of-the-regime, including commentators, journalists, academics, leaders of the religious sects, and male politicians across various political parties.

Nevertheless, the initial mobilizations of men remained limited until the strategic re-positioning in 2019. Although there was no mention of the Istanbul Convention before 2019, these men have shifted their focus and reframed their demands by 1) labelling not only same-sex relationships but also women's independence from men as the biggest threat to the Turkishness and Muslimness of the family structure; 2) emphasizing the significance of such a family structure for the material and social existence of the Turkish and Muslim population; and 3) repeating the well-known delusion that the West aims to ruin Turkey. With the adoption of this new strategy, the previously established solidarity between these groups of "ordinary" men and men-of-the-regime has worked effectively and accelerated their influence not only over the leadership of the Justice and Development Party but also over the main coalition party (Nationalist Movement Party) and an opposition party (Felicity Party). Facing a strong reaction from women, the state's withdrawal decision was not so straightforward. Nonetheless, on March 2021, Erdoğan officially announced the withdrawal, on the grounds that the Convention is manipulated to normalize homosexuality, which is incompatible with Turkey's social and family values.

The case of the Istanbul Convention shows that the men's rights movement initially (2015-2018) failed to increase its influence over the state despite the efforts of men-of-the-regime. At this early stage, the women's strong resistance prevented their demands. With the adoption of the Turkish Muslim racist agenda (since 2019), men-of-the-regime have played a significant role in increasing the influence of patriarchal actors, thereby strengthening the domestic patriarchal state. This assessment contributes to gender regime scholarship by 1) investigating diverse groups constituting the patriarchal political actors, especially within the contexts of the Global South; and 2) exploring the ways in which the interplay between multiple state agendas increases the collective bargaining capacity of men. ∎

Direct all correspondence to Ece Kocabıçak <Ece.Kocabicak@open.ac.uk>

> A Southern European Gender Regime?

by **Alba Alonso**, University of Santiago de Compostela, Spain, **Rossella Ciccia**, University of Oxford, UK and member of ISA Research Committees on Economy and Society (RC02), and Poverty, Social Welfare and Social Policy (RC19), and **Emanuela Lombardo**, Complutense University of Madrid, Spain

Spain and Italy are often lumped together as belonging to the domestic or conservative model of gender regimes. However, in the last decades the two countries have shown signs of hybridization and have become increasingly dissimilar. Credit: Granata92 / [Wikimedia Commons](#).

How can we understand differences in the gender regime of Southern European states? What explains the different trajectories of gender regimes? Spain and Italy are often lumped together as belonging to the domestic or conservative model because of their shared legacy of authoritarianism and the familialistic nature of their welfare state, which entrenches unequal gender relations and restricts women's access to the public sphere. However, in the last decades the two countries have shown signs of hybridization and have become increasingly dissimilar, with Spain moving towards a more public form, while in Italy the pace of change has been much slower, and in the direction of an even greater privatization of its gender regime.

We argue that polity and civil society processes are a crucial "engine" of change of gender regimes. Dynamics between polity and civil society have been analyzed by the literature on state feminism, in which studies of Western post-industrial democracies have explored the extent to which state feminism promotes the democratic and substantial representation of women's interests, and the relevance of alliances between feminist movements and women's policy agencies for gendering policy debates. Features of the political party system, institutional lega-cies, constellations of actors in favor and against gender equality, the role of organized religion, women's political representation, and prevailing societal ideas about gender roles complement the role of state feminism and the women's movement, by creating specific configurations of interacting factors that produce variations in the trajectories of gender regimes.

Our study challenges the existence of a Southern European gender regime model that fits all countries from this area. The analysis of trajectories of gender equality policies in Italy and Spain in the 2000s, with reference to former legacies of institutionalization of gender equality, shows that the two Southern European countries cannot be lumped together under the same model because they significantly diverge in their gender regime: while the Spanish gender regime has become increasingly public, moving between social democratic-progressive and neoliberal-conservative forms depending on the color of the party in government, the Italian gender regime remains more domestic and conservative.

> Dynamics in polity and civil society

Variations in the gender regime are crucially affected by dynamics within and between the polity and civil society domains. Key factors that allow our assessment of the gender regime in Italy and Spain in the *polity* are: 1) a political party system which is more hostile in Italy than in Spain, given the strength of mainstream center-right parties in Italy; the presence of center-left parties more proactive on gender equality in Spain; and the growing strength of radical right populist parties – stronger and with governmental roles in Italy from the 1990s, but only now emerging in Spain; 2) the depth of democracy: women's political representation is very low in Italy – stuck at 11% until 2018 – as compared to Spain, where it has been around 40% since 2007; 3) the interference of organized religion in politics: the Vatican and its civil society and political allies have a more direct access to the state and detrimental effect for equality in Italy than in Spain; 4) state feminism and velvet triangles (i.e. inter-actions between policy-makers, feminist academics and experts, and feminist movements): Italy as compared to

>>

30

Spain presents a weak gender equality institutionalization and weaker alliances between feminist activists, legislators, femocrats, and academics; 5) federalism is a progressive force in Spain, triggering policy innovation in gender equality among the regions, and between regions and the central state, while this is not the case in Italy; 6) familism as a feature of the welfare system has remained stronger in Italy compared to Spain.

For *civil society*, crucial factors that affect our assessment are the following: 1) the type of women's movement: in Italy, being based more on difference than equality and less state-oriented than in Spain, where the presence of femocrats and feminists within left parties has ensured continuity in gender equality policy development; 2) the strength of anti-gender movements and their support from formal political actors: this is greater in Italy than Spain, with important ties between movements and radical right-populist parties in government, while in Spain this political connection is a more recent phenomenon; 3) knowledge: while Spain's public opinion evolves towards progressive ideas about gender roles and greater secularization, in Italy conservatism in political culture and society prevails.

Overall, factors that push for gender equality policies have exercised a greater pressure towards a public gender regime in Spain, while conservative and anti-gender forces in both polity and civil society have determined a more hostile context for the development of a public and progressive gender regime in Italy. The permanence of conservative ideas about gender roles in the family, employment, and politics influences the permanence of traditional family structures in Italy, while Spain is moving towards a dual-earner model. Organized religion has a stronger detrimental influence on Italy's gender regime too, with the greater secularization of Spanish society as compared to the Italian having allowed Spain greater progress in gender equality.

This comparative study has reached conclusions on the divergent gender regimes of Italy and Spain through a focus on the interplay between the polity and civil society domains as engines of change. Future studies will need to take into account interaction with other crucial domains, such as the economy, violence, knowledge, and issues related to body and sexuality, to provide a more comprehensive understanding of the differences between Southern European gender regimes that challenge general, less accurate, typologies. ◼

Direct all correspondence to Emanuela Lombardo <elombardo@cps.ucm.es>

31

> A Crisis Too Far?
The EU Gender Regime Post-Covid

by **Roberta Guerrina**, University of Bristol, UK, **Heather MacRae**, York University, Canada, and **Annick Masselot**, University of Canterbury, New Zealand

The pandemic, more than previous crises, has highlighted the crucial role played by women in sustaining the economy and social fabric in the European Union. Illustration by Arbu.
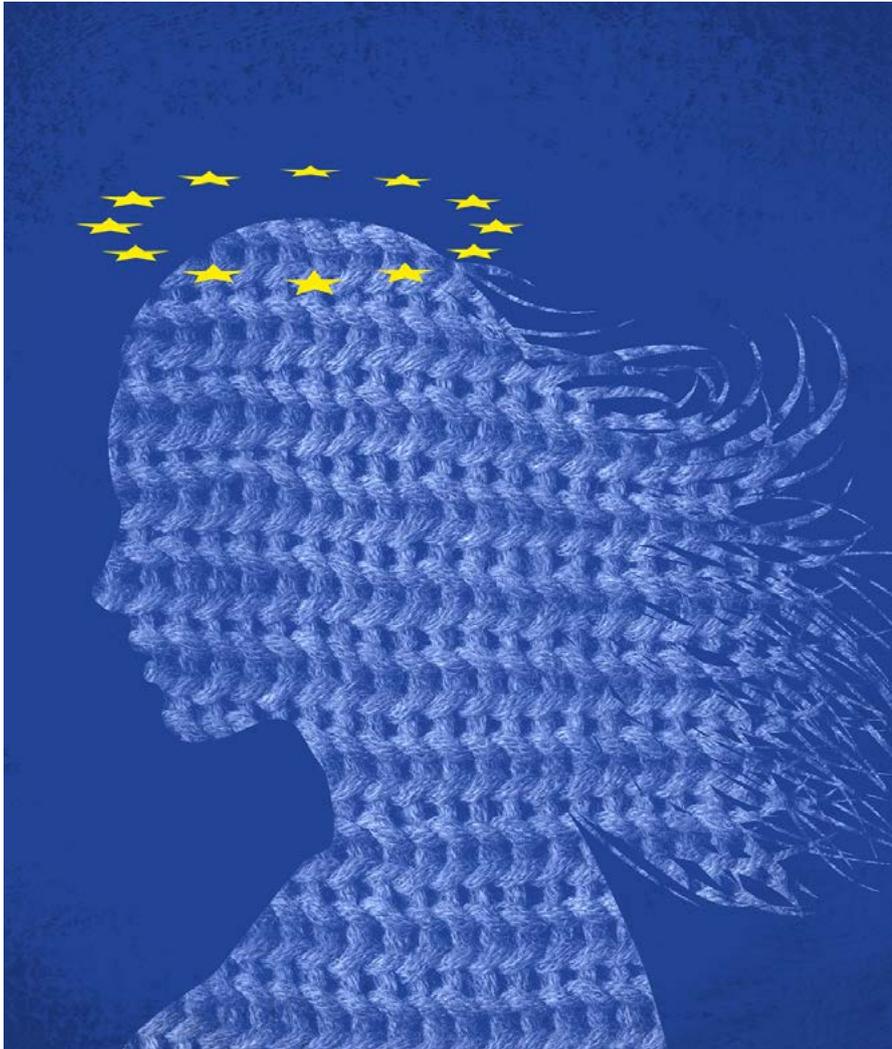
2020 will be remembered as the year that the world slowed down. For many commentators, the spread of COVID-19 threw into disarray established social, political, and economic certainties and the norms that guided the global political economy. Others saw this crisis as an opportunity to reflect on our impact on the planet and the interconnected nature of socio-political structures. For the EU, already rattled by various other crises, the pandemic represents an existential dilemma: is this *the* crisis that opens the gates to disintegration, or is it an opportunity to envisage a new and more inclusive Union? More pointedly for our analysis, what is the role of the EU as a gender actor post-pandemic? And, what is future of the EU's gender?

The gendered and racialized impact of crises within the EU's borders, as well as the EU's role as a gender actor and its strategic deployment of equality discourse by the institutions have been well documented. The impact of the current polycrisis, i.e. the process whereby multiple and overlapping crises merge into a "state of being," on the EU's gender regime underscores a critical juncture, perhaps more significant than those that have gone before. For Sylvia Walby, under the pressure of these multiple crises, the EU's gender regime is moving from social democratic to a more neoliberal public gender regime in some respects, though with counter tendencies in others. In terms of our analysis, this polycrisis represents a test of the EU's values and identity, especially in relation to the

>>

EU's ascribed role as a gender actor within its own boundaries as well as for its external partners and neighbours.

> A long history of crisis

The story of European integration is one of crisis. These crises and their post-crisis settlements are typically mythologized as having opened economic opportunities and created new political spaces. As EU scholars we learnt that the project of European integration has its roots in the complex geopolitical dynamics of twentieth-century Europe; like a phoenix rising from the ashes of war-torn Europe, the EU has helped to secure peace on the continent for the best part of 70 years. This is of course a partial history. It overlooks the failures of the European Union to deal with the conflict in the Balkans as well as the impact of the single market on the weaker economies of the bloc. Also, adopting an intersectional feminist lens reveals that such opportunities are not equally accessible to everyone. Rather, successive crises have sidelined further key concerns about social justice and equality.

COVID-19 is only the latest in a series of crises. Perhaps more pointedly than previous crises, the global pandemic has highlighted gendered and racialized divisions of labor in the private sphere, as well as in the formal economy. Understanding the focus of the post-COVID recovery plan allows us to assess key priorities and the vision for the future of the economy and the gender regime. The question here for us is whether the balance of changes in the gender regime as outlined by Walby is towards a less democratic regime, or whether it opens a space for imagining a more inclusive future. The post-2020 settlement thus must be understood within the historical context of the polycrisis, defined by the 2008 Euro crisis (and associated politics of austerity), the ongoing humanitarian crisis in the Mediterranean and the ever-more dangerous migration routes, and finally Brexit and the rise of anti-European populist movements across the continent.

> The gender regime under COVID-19

During the first stage of the COVID-19 crisis, the focus was on a pan-European response and the resilience of national health services. Health care workers, doctors, and nurses, were described as heroes for doing work under strenuous circumstances in what was branded the new frontline in the fight against the virus. During this phase, public health became securitized. As many families reorganized work and life to be conducted from home, the burden of schooling and caring fell largely on women/mothers. Indeed, women continue to provide most of the unpaid, invisible, yet essential care which supports the entire economy. The pan-European trend was thus towards an increasingly private gender regime which reaffirmed a traditional gender division of labor.

Public health measures aimed at preventing the spread of COVID-19 thus highlighted one of the most fundamental failings of the equality model embedded in a neoliberal gender regime. Focusing on access to the labor market and activation of women with school-age children has done very little to challenge deeply rooted gender divisions of care work in households. This crisis, more so than previous ones, has highlighted the crucial role played by women in the economy as well as the continued importance of social reproduction to the functioning of the formal economy. Many of the key workers "fighting the virus on the frontlines" as cleaners, nurses, carers, and doctors are women. In many ways, policy responses to COVID-19 have highlighted the longevity of the values associated with the male breadwinner model. The irony is that the work that sustained European society during the global pandemic was the kind of under-valued, disrespected work done by women, which is so easily ignored and rendered invisible in the official accounting of the economy, and by extension the EU's gender regime. The adoption of the EU Work-Life Balance Directive in 2019 seems to have done little to mitigate the negative impact of the double burden on carers during the global pandemic. However, it is a platform for the emergence of an "EU care policy" to be included in the EU post-Covid Recovery Plan.

What will be the impact of the polycrisis on the EU's gender regime? The European Commission's Recovery Plan is an opportunity to think about the kind of organization the EU is going to be. This vision includes a clear ambition, with an equally ambitious budget, to support a "just transition" and recovery. The question that remains unanswered concerns the impact of this investment on the EU's gender regime and its constituent domains. ■

Direct all correspondence to Roberta Guerrina <roberta.guerrina@bristol.ac.uk>

33

> Playing with Fire:
The Sociology of Masculinities

by **Raewyn Connell**, Professor Emerita, University of Sydney, Australia, and member of ISA Research Committees on Women and Society (RC32) and Conceptual and Terminological Analysis (RC35)

Modern statue of Gilgamesh on the University of Sydney Campus. Gilgamesh is depictured here unharmed after fighting the lion he holds in his hand. Credit: Gwil5083 /Creative Commons.

Questions about masculinities – different ways of occupying the social position of a man – are by no means new. The Sumerian-Akkadian *Epic of Gilgamesh*, four thousand years ago, told a story of two contrasting masculinities, the urbane royalty of Gilgamesh and the wild-man Enkidu. The great classic of Hellenic literature, the *Iliad*, told of the love between Patroclus the impulsive and inadequate comrade, and Achilles the bitter, efficient killer. Indeed that relationship was the hinge of Homer's story.

The modern sociology of masculinities does not depend on legends, though we should remember its deep cultural background in stories of power, violence, and comradeship. As the South African psychologist Kopano Ratele reminds us, it is easy to over-simplify "traditional" masculinity. Actual traditions are multiple, complex, and contested.

> Emergence: from sex roles to structural theory

The meaning of masculinity can be put in doubt by social crises, from colonial conquest to mass unemployment, and by challenges from women's movements. It's not surprising that the pioneering psychoanalytic explorations of masculinity (by Freud, Jung, and above all Adler) coincided with the women's suffrage movement and the idea of the "new woman" in central Europe. This was the society that produced the first full-scale sociological theory of gender, developed by the German feminist educator Mathilde Vaerting.

A turning point for modern research on masculinity was the global Women's Liberation movement in the 1970s. At that time, the leading social-scientific framework for understanding gender was the idea of "sex roles." This remains a familiar idea in mass media, in social psychology, and in practical fields such as education and health work. The development of masculinity can be interpreted as the learning of a sex role, while smoking, bad diet, and road accidents among young men can be seen as consequences of male role norms.

The idea of sex roles is a useful first approximation of a social analysis of gender. It provides a clear alternative to the belief that masculinity and femininity are fixed by genetics or by God. It calls attention to the agents (parents,

>>

34

mass media, etc.) who define the norms and influence learning. The concept recognizes that sex roles can change if the social norms governing them should change. In the 1970s, many feminist groups set out to change the norms for the female role. Some activists tried to do the same for the male role, speaking of "men's liberation" alongside the liberation of women. In the United States this agenda influenced a progressive national organization for men formed in 1981-82.

But serious weaknesses in the sex role concept soon became apparent. It was usually assumed that there was one male role and *one* female role in any society. Empirical research repeatedly showed multiple gender patterns. Role theory could not explain the massive gender differences in wealth, income, and land ownership that exist in most parts of the world. At best, it could show adjustments to economic inequality. Sex role theory, finally, had great difficulty with issues of power and violence.

By the 1980s, social scientists in a number of countries were trying to work beyond the role/norm approach. They treated gender as a large-scale social structure, involving economies and states as well as families and inter-personal relations. At the same time, more complex pictures of masculinity were being constructed, drawing ideas from gay liberation and civil rights movements as well as from women's liberation. Sociologists also drew on psychoanalysis, ethnography, and quantitative research.

In 1985, Sigrid Metz-Göckel and Ursula Müller published *Der Mann*, reporting a national survey of men's lives and attitudes in Germany. In the same year, an Australian team published a manifesto "Toward a new sociology of masculinity," and three sessions about "men's studies" were held at the activist organization's conference in the United States. Even before that, Ashis Nandy in India published his brilliant account of the construction of masculinities in colonialism, *The Intimate Enemy* (1983).

> **The global terrain**

Within a decade, a field of research had been established, variously known as "men's studies" (in parallel with "women's studies"), "Männerforschung" (research on men) in German, "masculinity studies," "critical studies on men and masculinity," or similar phrases. Its initial centers were in universities in rich countries and regions: Germany, Scandinavia, the UK, the USA, and Australia. The universities did not set up men's studies departments. Rather, teaching about masculinity was usually done in broader gender-studies programs, or in gender courses in departments of sociology, history, literature, and other human sciences.

During the 1990s and after, specialized journals were created; there are now eight research journals dealing with masculinities, published in five different countries. There have been several initiatives to set up specialized research centers, but only a few have continued. Conferences of researchers, however, have been frequent since the 1990s. In a mighty feat of bibliography, a very extensive list of publications has been maintained online since 1992, coordinated by Michael Flood in Australia; it is open-access at www.xyonline.net.

The discussions were international from the start, and the research field rapidly became global. By the turn of the century, not just individual articles but whole collections of research on masculinities had appeared, or were about to appear, from India, Chile, Brazil, the United States, Britain, Germany, southern Africa, Australia, Japan, and the Nordic countries. Research with men for violence prevention has been sponsored on a multinational scale by United Nations agencies, for instance in countries of south and south-east Asia. More multi-country collections have appeared, covering fields such as masculinity and sport, masculinities in disasters, and indigenous masculinities.

In this worldwide effort, the most sustained program of masculinities research is the series of international conferences, books, and research projects organized by José Olavarría, Teresa Valdés, and their colleagues in Chile. This program has been running productively for over twenty years, and has recently been celebrated with an anniversary volume *Masculinidades en América Latina: Veinte años de estudios y políticas para la igualdad de género*.

The field has always had a practical side. The early link to liberation movements meant an interest in changing masculinities and contesting oppression. Many programs to reduce gender-based violence have been launched, combining research and activism – difficult as this task has been. Masculinity research rapidly found applications in professional fields including the education of boys, counselling and psychotherapy, and issues around men's health (including diet, accident prevention, smoking, alcohol consumption, workplace stress, and sexually transmitted diseases).

> **Changing ideas about masculinities**

No research field can remain static; research is, after all, designed to extend and correct our knowledge. Over the last forty years, masculinities research has of course seen debates, shifts, and sometimes shocks.

One of the debates has concerned the sociological concept of "hegemonic masculinity." This idea was introduced during the 1980s in a structural analysis, connecting hierarchy among masculinities with the overall inequalities between men and women. Since then, the idea of hegemonic masculinity has often been used without the background analysis of social structure. Despite this simplification, the

35

>>

concept has helped to keep masculinity research aware of power and inequality in gender relations. It has therefore been of value in research on masculinized elites, as well as in studies of schools, workplaces, and mass media.

But we can over-emphasize structural determination. In response to that problem, there has been more emphasis on flexibility in the definition and practice of masculinities. Post-structuralist approaches that understand gender mainly in discursive terms have supported this. Particularly interesting are suggestions that hegemonic forms of masculinity may change by adopting aspects of subordinated masculinities. This idea has given rise to the concept of "hybrid masculinities," which is helpful in understanding how gender orders change.

The question of change raises a strategically important theme. How do we theorize more egalitarian forms of masculinity, which, we may hope, prefigure ways for men to live in a gender-equal society? From early days there has been a scatter of such research. Researchers have looked at masculinities being re-imagined in the environmental movement, at husbands sharing the housework in "fair families," at workers who become house-husbands, at young men practicing more engaged fatherhood, at soldiers who become peace activists. Surveys of social attitudes in a number of countries have found more commitment to equality between women and men, and more acceptance of gay men, in younger generations. Whether we should think of these patterns as *one* new form of masculinity is debatable. But it is important to know that research yields stories of positive change, as well as stories of violence and oppression.

> Complicating the world picture

Like many other fields of sociology, the study of masculinities has been influenced by the idea of intersectionality. Research on masculinities long ago recognized cultural differences, especially in relation to social class. Paul Willis' study of British working-class youth in *Learning to Labour* (1977) is a notable example. Questions of ethnicity, race and indigeneity have come more into focus in recent decades.

"Intersectionality" provided a name for cross-cutting social hierarchies, but the geometrical metaphor often produced a static picture of difference. Recent work, such as Mara Viveros Vigoya's *Les couleurs de la masculinité* (2018), based on her research in Colombia, shows how a historically dynamic treatment of intersectionality can illuminate the realities of power, oppression, and social struggle.

Very important for the future of the field, social research on men and masculinities is incorporating more postcolo-

nial, de-colonial, indigenous, and Global South perspectives. For a decade the studies of masculinities in colonialism by Ashis Nandy in India and Jock Phillips in Aotearoa New Zealand stood practically alone. This field of history is now much richer. There is also a growing wealth of surveys, ethnographies, institutional studies, and theorizing about masculinity from postcolonial and semi-peripheral countries. We now have, especially from Latin America, the beginnings of a general account of how imperialism, colonization, and postcolonial dependence have shaped the making of masculinities.

> The politics of knowledge

I called this article "playing with fire," because serious research on masculinities is likely to bump up against powerful interests. Social research and theory is generally dangerous to the conventional beliefs that protect social hierarchies. This is not a small matter. When we look at the most powerful groups in the world – the billionaires, the transnational corporate managers, the generals, the political elites, the religious authorities – we are looking at strongly masculinized groups. Backlash would not be surprising, and backlash has come.

The best-selling books on masculinity are not the research-based literature; rather they are pop psychology celebrations of an imaginary "true masculinity." The first grant I received for empirical research on masculinities, back in the 1980s, was attacked by conservative politicians in the national parliament. The whole field of gender studies has recently been banned from universities by the authoritarian government of Hungary. Other governments are de-funding the humanities and social sciences generally. Attacks on "gender theory" have recently come from ultra-conservatives in the Catholic Church, in a campaign that has now spread internationally among right-wing parties and movements.

So this is not a peaceful field for researchers! But a deeper understanding of masculinities matters, both for the social sciences and for social justice struggles. It is a necessary part of the study of gender and sexuality, and of research in fields ranging from family studies to industrial sociology. Knowledge about masculinities helps us understand both pressures for social change and resistances to change. This field of knowledge offers sociologists new connections with both social movements and professional practices. Perhaps most important, studying masculinities has added a new dimension to our understanding of power, and how power becomes embedded in everyday life. It's important that this work should continue. ■

36

Direct all correspondence to Raewyn Connell <raewyn.connell@sydney.edu.au>

> Tributes to Mona Abaza (1959-2021)

by **Michael Burawoy**, University of California, Berkeley, USA

Mona Abaza at her desk at The American University in Cairo.

Mona Abaza at the exhibition of her photos from her book, The Cotton Plantation Remembered.

On July 5, 2021 the world lost one of its great sociologists. After battling with cancer for more than two years, Mona Abaza finally succumbed. To the end she was determined to live her life to the full, to the end she followed the ebb and flow of politics and the pandemic; to the end she followed the life of her friends. Suffering from interminable pain, having lost the functioning of several organs, she nevertheless continued teaching her students at the American University in Cairo from her bed in Berlin. Over her vibrant career, her writing ranged from women in rural Egypt, the relation between Islam and the West, urban consumer culture, to Egyptian painting and the Arab Spring.

Her sociology was an art form brought to perfection in her last two books. *The Cotton Plantation Remembered* (2013) is a history of her family's estate, beautifully photographed and lovingly narrated through the eyes and voices of its accountants, clerks, workers and peasants, drawn from conversations and interviews that stretched over several decades. Her last book, *Cairo collages* (2020) is a lyrical rendition of life in an impossible city during the decade after the January revolution of 2011. Vividly capturing dramas unfolding inside and outside her building in the heart of Cairo, this work of ethnographic genius revolves around the elevator with its ceaseless breakdowns and equally ceaseless attempts at restoration, a metaphor for the city

as a whole – a magical mingling of utopia and dystopia.

Fluent in English, French and German as well as Arabic, she was the great connector, overflowing neat classifications – North-South, East-West, local-cosmopolitan – always generous and sympathetic to the plight of others. She was a close friend of *Global Dialogue* that published her accounts of the rise and fall of the Arab Spring, illustrated with her unforgettable photos, starting with "Revolutionary Moments in Tahrir Square," moving on to "The War of the Walls," "The Violence of Egypt's Counter-Revolution" and ending with an interview on "The Fate of Post-Revolutionary Egypt." Below we publish a few tributes from friends and colleagues. ■

by **Vineeta Sinha**, National University of Singapore, Singapore

Mona Abaza's passing is a loss that's impossible for me to register in words. I had known her since she spent time in Singapore during the phase of her Southeast Asian research. An exceptional sociologist, activist, feminist scholar – a mentor who inspired peers and students alike – whose passing has left an immeasurable void. Without doubt, her committed, incisive and passionate scholarship was pioneering. Her international standing as a respected global scholar was achieved in a period when academia around the world struggled to deal

with histories of gender, racial and religious prejudices. Mona was indefatigable, exuding endless energy and a generosity of spirit – even as she faced personal struggles of her own. What I admired most about Mona was her vision of an inclusive humanity that was sensitive to histories of discrimination

>>

37

and lingering remnants of prejudice. She had the conviction and courage to speak up and act against the atrocities she witnessed. I interacted with Mona in recent years in meetings of the ISA in different parts of the world, where I continued to see her extend a simple humanity that spoke volumes about her care and concern, especially for younger and women scholars from the Global South. She was an inspirational role model and mentor as a feminist scholar committed to reconfiguring sexuality, gender, and power dynamics that continue to deeply mark our social worlds. Above all else, I will miss Mona's twinkling eyes, her infectious smile and her willingness to always escape a dull conference session to steal a cup of coffee with a friend. Rest in peace Mona – you are deeply missed. ■

by **Bryan Turner**, Australian Catholic University, Australia

Mona was a dazzling charismatic intellectual whose range of interests defy easy description. Her untimely death is a sad blow to friends, students, American University in Cairo and the wider academic world. I was fortunate in that my own life often intersected with Mona's trajectory – Adelaide in Australia, Bielefeld in Germany, the Netherlands, Cambridge in England, Cairo and Singapore. She often published her work in *Theory, Culture & Society* – the leading British journal in cultural studies – but her research also encompassed such topics as the history of the cotton plantation in 2013. With a PhD from the University of Bielefeld in 1990 and a command of several languages, Mona was a true cosmopolitan whose work and life joined East and West. Many scholars of Islam often focus exclusively on the Middle East, whereas her own work from the beginning combined and addressed the interconnections between Egypt, Malaysia and Indonesia. Her first major publication – *Debates on Islam and Knowledge in Malaysia and Egypt* – in 2002 was light-years ahead of the field in her examination of the "Islamization of Knowledge." The topic of course continues to grow in importance. ■

by **Suad Joseph**, University of California, Davis, USA

I met Mona Abaza over twenty years ago, when I was housed in the same department while I was, for two years, the director of the University of California Education Abroad Program at the American University in Cairo. She seemed like a disappearing act to me then. She was so distinguished, so in demand, that she was constantly leaving to travel, by invitation, for keynote lectures and other honors. Moments of respite, when we had a chance to talk more leisurely, over dinner, at the home of mutual friends, she stunned me with her brilliance, her sociological insights, her passion for things of Egypt and of the Arab region. That critical commitment showed brightly during the 2011 protests in Egypt. As she, and millions of others, participated in one of the most hopeful moments of modern-day Egypt and of the Arab region, she stood out for her simultaneous political and scholarly engagement. What protestors crafted as a creative language of revolutionary communication, Mona took as a subject of study and inquiry – the graffiti that blared out on the walls of buildings surrounding Tahrir Square, as if they were bull horns calling people to speak out. She walked the square, daily, photographed the graffiti to record the voices of the uprising, marking an historical moment that captured the imagination, the hope, the spirit of the Egyptian millions. When I visited, she walked me around Tahrir, around the streets near the square, describing that creativity that struggle to speak and to be heard. She recorded. She documented. She registered. She transformed art into history. I was moved by her narration and her grasp of revolutionary struggle and her embrace of the will to empower the everyday Egyptian.

Years later, I and my co-editor, Zeina Zaatari, invited her to contribute to our *Handbook of Middle East Women* (Routledge). She was already ill. Yet, with pain, she wrote. We submitted the book for review, just weeks before she passed. She had disappeared. But we had her brilliant chapter. Her loving daughter, Laura Stauth, agreed to work with us on any needed revisions. Mona disappeared, again. But we have her. We have her in her writings that will be with us, always. ■

38

by **Paul Amar**, University of California, Santa Barbara, USA

Mona Abaza provides a global model for bridging the most disabling gaps in traditional West-centric sociology splitting rural from urban, economic subjects from faith subjects, and the material from the aesthetic. For this reason, Mona's work is a revolution in the fields of sociology. In her hands an Egyptian synthesis becomes a vision for 21st- century sociology as a whole. The number of book monographs she has published is stunning. Each one offers a field-shaping contribution. Her urban sociology of consumer culture is enriched with economic anthropology of contentious and commodified spaces. Her rural sociology brings novel perspectives on gender and class through the comparative study of everyday Islam in different parts of the world (Malaysia, Europe, Middle East). Her sociology of art is infused with vernacular "street" perspectives, inventing reflexive methods for analyzing memory, mourning, and memorialization. These three field-shaping interventions intersect and propel each other in dynamic and inspiring ways. Mona was not only a scholar of great distinction; she was an incredibly generous mentor. Her classes were legendary, welcoming foreign scholars, shaping the department at the American University in Cairo, putting it on the map worldwide. ■

by **Syed Farid Alatas**, the National University of Singapore, Singapore

Mona was an exceptional scholar, a concerned and committed friend, and a wonderful person. Her passing has reminded me of the preciousness of close and warm friendships, without which scholarship can be meaningless and alienating.

To me, Mona's scholarship, which covered many themes, was not just brilliant and insightful. It touched me in a very personal way. Her early research critically examined knowledge production in Egypt and Malaysia. This focus was unique and she was among the few scholars who had a serious interest in both her own region, the Arab world, and the Malay-Indonesian Archipelago. South-South research and the interactions it creates is much talked about today in the context of the decolonization of knowledge, but Mona was at it 30 years ago.

My most enduring memory of Mona is of the time that I spoke with her over the phone in 2020. She was undergoing treatment in Berlin. Despite her own serious illness, she had the presence of mind and concern to ask about a mutual friend in Singapore who was also very ill. Mona was a serious and impactful sociologist, and a kind mentor. But I remember her best as a lovely and compassionate person. Farewell, Mona, and may you journey with ease in the next life. ■

by **Sami Zubaida**, London School of Oriental Studies, UK

I knew Mona over many decades, from her student days, then encounters in various European locations, Germany, Holland, Sweden where she pursued her multi-faceted scholarship. Her company and conversation were always such a pleasure of conviviality and humor, whether over drinks in Leiden, or sightseeing in Lund. I followed the stream of her diverse projects over the years with great interest and pleasure. I was especially drawn to her vivid portrayal of Egyptian life and events, at once analytical and personal, bringing to life the ups and downs of urban life, from shopping malls to residential blocks to the trials of commuting and moving around the city, always with subtlety and wry humor, urban ethnography at its most profound. The most remarkable was the passionate chronicling of the events of Tahrir and what followed, including her pioneering studies of graffiti. And not just the urban: her memoir of her family's 'izba and village, *The Cotton Plantation Remembered*, chronicling the transformation of rural life, is a fine example of combining biography and history. And most notable in Mona's various ethnographies is her photography, an added dimension of insight and artistry. Mona's passing, too early, is such a loss to us all, and to the rich fields of scholarly endeavor. ■

Major books published by Mona Abaza:

■ *Debates on Islam and Knowledge in Malaysia and Egypt, Shifting Worlds*. Routledge Curzon Press, UK, 2002

■ *Changing Consumer Cultures of Modern Egypt: Cairo's Urban Reshaping*. Brill-Leiden co-published with AUC Press, 2006.

■ *Twentieth-Century Egyptian Art: The Private Collection of Sherwet Shafei*. The American University in Cairo Press, 2011.

■ *The Cotton Plantation Remembered: An Egyptian Family Story*. The American University in Cairo Press, 2013.

■ *Cairo collages. Everyday life practices after the event*. Manchester University Press, 2020.

39

> Introduction: New Directions in Indian Sociology

by **Sujata Patel**, Umea University, Sweden, member of ISA Research Committees on History of Sociology (RC08), Urban and Regional Development (RC21), Conceptual and Terminological Sociology (RC35), Historical Sociology (RC56), and board member of RC08

In order to understand current political and social development processes, new theoretical approaches and directions are required, as they have become increasingly established in Indian sociology in recent years. Credit: Evelyn Berg /flickr.
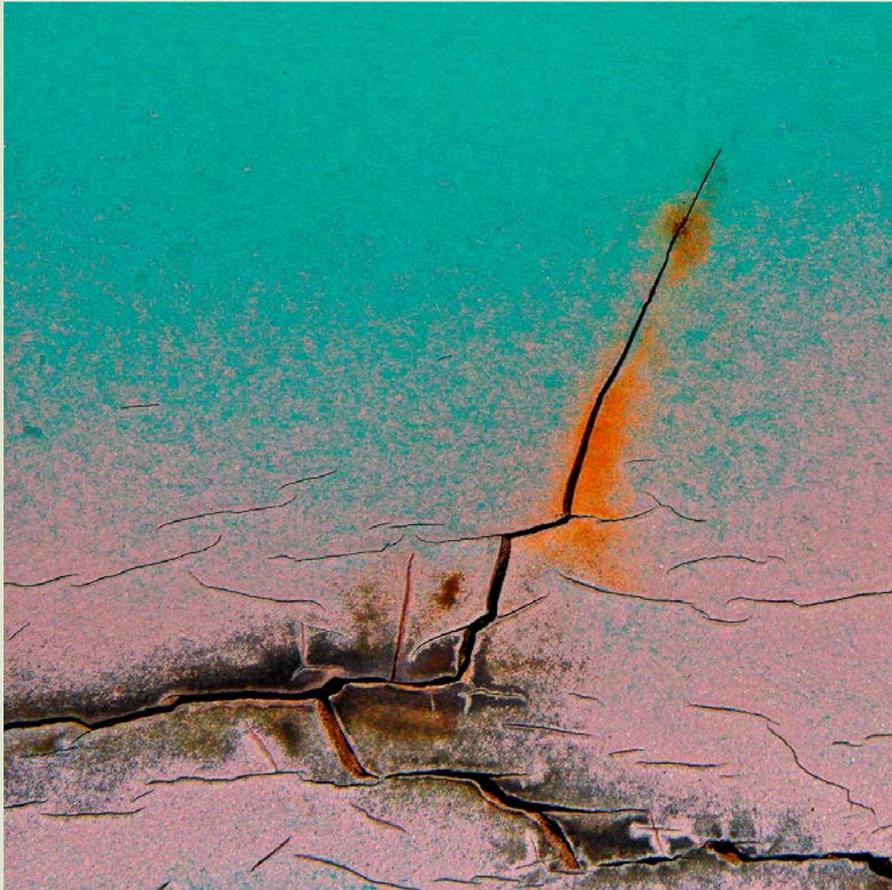
Sociological knowledge in India has been closely associated with the political projects of colonialism and nationalism. However, since the 1980s and 1990s, two sets of processes have triggered individuals and groups to adopt a new language of rights and question the conception of passive citizenship articulated by the Indian state. At one level, there has been the growth of social movements of women, tribes, lower castes, and ethnic groups, and regional movements of self-determination and sub-nationalism as well as insurgencies in Kashmir and the Northeast of India; and at the other level, there has been the consolidation of Hindu majoritarianism.

These developments have had an impact on sociological thinking as cracks appeared in the content of established sociological principles dictated by ethnography. A new generation of scholars has moved beyond the debate in India around indigenous sociology versus western sociology to reframe research questions, perspectives, and methods of study. They ask what sociology is, and whether it can continue engaging with colonial and nationalist methods such as ethnography to comprehend the Indian "social." If not, what new methods can be used? Can these methods foster comparative assessments? Lastly, what is sociology's relationship to those who are exploited, discriminated, and excluded, not only in India but across the world?

The four papers presented in this special section on Indian sociology are part of this endeavor to rethink the ways to comprehend the new "social" being constituted in India. These papers interrogate the contemporary processes of modernity promoted by the Indian nation-state. They explore the cleavages and conflicts that these have generated, which have led to overt and covert practices of violence targeting subaltern groups and affected trust between individuals within and between these groups. The papers deliberate on the limitations and constraints that

>>

40

the authors have faced in applying ethnography as theory and method. They present their doubts and queries, and attempt to fashion new concepts and reflection on theories and methods to help answer their research queries and thereby comprehend the complex processes of change occurring in the country.

Rakesh Krishnan suggests that the principle of duality dictated colonial and post-independence policies regarding tribes – social groups living in the heartland of India. On the one hand, the colonial and later the nationalist states identified tribal groups in terms of administrative territories called scheduled districts to protect their cultures from mainstream "civilized" and "settled" peasant regions. On the other hand, a belief in linear change and development led these regimes to introduce programs to mainstream these groups into civilized and modern arenas. This duality has led to the growth of conflicts and contradictions and the assertion of sovereign rights by tribal movements. To engage with this paradox, Krishnan suggests the use of the concept of frontiers. He argues that a study of central India is messy, and only a historical approach can help sociologists assess the dialectic between the state and its people and unravel the conflicts, contradictions, and messiness of this encounter.

Unlike ethnographers/anthropologists of tribes, who supported colonial and nationalist policies that advocated duality, sociologists doing gender studies have – since the late 1970s – abandoned ethnography for a historical understanding. Sneha Gole argues that this approach allowed feminist studies in India to interrogate and destabilize in radical ways the way "women" have been perceived in colonial and nationalist frames and in the early conceptualizations of the women's movement in India. The introduction in the 1990s of the debate on intersectionality has furthered this rethinking. Gole discusses her use of the life narrative method, and insights from memory studies, to understand how three generations of feminists reassess their lives through an intersectional perspective, reinterpreting their earlier activist interventions. She argues that their assessments articulate ways in which class, caste, sexuality, disability, and region intersect and frame their feminist identity. These life narratives, she argues, have provided a conceptual apparatus for how to comprehend intersectionalities in the Indian context.

The next two papers debate ways to use ethnography in new contexts and with new perspectives. In the northeastern region of India, whose population was (once again) identified as tribes by the British, there has been a long history of insurgent movements. As these continued after India became independent, the new state-imposed martial law, the Armed Forces Special Powers Act, gave the military the powers to govern the region, making the people living in this region subjects rather than citizens. Thus, Soibam Haripriya asks: what does this context bring to the way we practice sociology as ethnography? Increased confrontations between the military and the insurgents lead to a trust deficit and confusion in recognizing collaborators. In addition, the indiscriminate killings based on mere suspicion render the sociological field rife with rumors and foster mutual distrust. Soibam argues that this fraught context offers a major challenge even to a native/insider sociologist, a member of the same ethnic/tribal group. In this context, she asks, how can a sociologist wanting to analyze the ways in which violence affects social relationships do research? Soibam reflects on the methodology of doing fieldwork in violent sites and argues that a foray into literary texts helps comprehend the context more graphically than the field as defined by ethnography.

The last paper in this section is by Shireen Mirza, who suggests that ethnography can help to comprehend the way caste ideology intersects with modernity. Her ethnographic work focuses on the urban sanitation system in modern India as governmentalizing caste pollution. Her study is about Mumbai's sanitation system, where the Municipality has recruited "polluted" castes, lowest in the caste hierarchy, to pick and clean waste: cleaning, sweeping, slaughtering, and removing refuse. She suggests that the concepts of stigma and caste labor help comprehend the present context wherein those who work in this laboring activity get signified by pollution. She takes the case of Dalit Muslim and Dalit Hindu waste-pickers to show crosscutting identities of caste and religion. This ethnographical work makes her interrogate the colonial understanding that divided Hindu castes from other minorities. Destabilizing existing and received notions, Mirza describes bodily histories of caste and stigma in Mumbai's municipal solid waste management department. Her ethnography reveals ways in which the stigmatized body is produced as a receptacle of the materiality of caste and is configured in relation to particular objects.

These papers highlight the nuances that need to be assessed to build "good practices" in sociological thinking. They argue not only for a reflexivity that can assess the politics of knowledge production and its circulation, but also affirm the relevance of scientific assessments to comprehend the contemporary and to relate it to the concerns of humanity. ■

Direct all correspondence to Sujata Patel <patel.sujata09@gmail.com>

41

> Deconstructing Tribal Geographies in Central India

by **Rakesh M. Krishnan**, University of Hyderabad, India

In this essay, I argue that historical sociology is vital to strengthening the sociological understanding of tribal communities. Presently, the anthropological literature on tribal communities informing sociological analysis lacks both contextualization and a historical dimension. Hence, a comparative historical recontextualization of categories of analysis can clarify the messy entanglements of the tribal world. I argue that the "frontier" as a category can capture these messy entanglements, the limits of state power and people's aspirations. Here frontier means both the edge of settlements beyond which the unknown exists and what is unknown about a particular subject or their activities. Frontier as a concept critically evaluates the interface between different cultures of social order and social engineering.

> ## > Colonial geographies

The notions of difference and hierarchy dictated colonial policies regarding tribal communities – social groups living in hilly central India, a region of rivers, dense forests, and rich mineral resources. Colonial expansion standardized the term "tribe"; colonial rulers borrowed it from the African usage. They classified these groups as "primitive," "wild," and "barbaric," given their animist religious practices, and distinguished them from settled Hindu caste peasant communities. Difficulty in governing these "wild tracts," sites of revolts and rebellions from the early nineteenth century, led the colonial authorities to pass the Scheduled Districts Act of 1874. The colonial law created distinct geographies, wherein the colonial state placed and controlled the tribal communities as outside the civilized society. Within these administrative/geographic enclaves, colonial administrators and missionaries embarked on a "civilizing mission" to mainstream the tribal communities. The subordinated position of tribal communities in the colonial scheme of governance ruptured the precolonial understanding of tribal communities as people and places outside the direct control of the state.

The colonial laws encroached on tribal communities' natural resources and land, producing tension in tribal areas. Tribal communities were the first social group to resist British colonialism, since predatory capitalism, land encroachment, sedentarization, and taxation systems disturbed their way of life. Colonial administrative scholars and anthropologists, through ethnographic surveys, documentation, and reports, aided the project of instituting differences and hierarchies. Post-independence state policies and anthropological studies continued to refer to them as people(s) embedded within wildness, needing to be confined to territories outside civilized cultures.

> ## > Tribal communities and the nation-building project

In the late colonial and early post-independence years, anthropologists debated the location of tribal communities within the nation-building project. Approaches ranged from the idea of a world of "noble savages" to assimilation with Hindu society. Though these perspectives charted different strategies, they continued rather than displaced the colonial understandings of difference and hierarchy in conceptualizing tribal communities. With the aid of anthropologists who studied tribes, the state uncritically accepted colonial categories, seeing tribal communities as preliterate groups in constant need of aid from the nation-state. Even nationalist social sciences, including anthropology, did not consider the historical changes in the forces of production and people's aspirations within these geographies. Nor did they interrogate the historicity and relevance of colonial differences and hierarchies in a postcolonial society. Hence, the tribal communities continued to be perceived as subordinate social groups, on the first stage of the evolutionary cycle, static, and resistant to change. Two strategies dictated subsequent policies – protection and distinction from Hindu peasant communities, and simultaneous capitalist development of tribal areas. The state and social sciences pursued the "development" of the tribal communities on a territorial basis in the form of tribal sub-plan areas and an integrated tribal development agency. Educational, medical, and other infrastructural initiatives delivered "modernity" even as the tribal communities in the earmarked geographies enjoyed legal privileges and protection of socio-cultural rights.

Development initiated by the nationalist government did not reverse the encroachment by capital and non-tribals

>>

42

"With the aid of anthropologists who studied tribes, the state uncritically accepted colonial categories, seeing tribal communities as preliterate groups in constant need of aid from the nation-state"

into tribal areas. Moreover, the creation of national parks alienated tribal communities from the nation-state. Increasing natural resource extraction projects like mining and dams punctured the tribal landscape, triggering tribal autonomy movements. From the 1970s, communist revolutionaries and disenchanted tribal communities began to highlight assertively the process of accumulation by dispossession.

Not every tribal area became a scheduled area, and not all tribal peoples remained isolated. Some hill communities did not receive any protection, and their lands became spaces for urbanization and tourism. Other hill and forest communities lost their land to plantations and timber cultivation. Tribal communities outside administrative enclaves became wage laborers, and those within the enclaves remained isolated and outside the circuit of capital. This chaotic landscape accentuated by colonial and postcolonial capital has been inadequately appraised by anthropologists/sociologists in India.

> ### > The "frontier": displacing governmental categories

The sociology of tribal communities draws heavily from the colonial framework and uncritically accepts the state framing of inclusive exclusion, a process of simultaneously excluding them from the general population through specific geographies of administration and integrating them through educational and other assimilative strategies, per-

petuating differences and hierarchies. It is largely confined to evaluating government policies and programs focused on problem-solving empirical tasks. In this midst, nationalist sociologists lack the historical and comparative sensibilities to comprehend the issues concerning tribal communities, which is part of the legacy of the hegemonic sociological imagination in India. The subordination of tribal peoples in the colonial and nationalist framing occludes significant processes like the collapse of tribal cultural geography to an administrative space and the distinct trajectories of tribal interface inside and outside these administrative enclaves. This lack of engagement with epistemic categories requires a heuristic device to re-insert the historical and geographical dimensions within a comparative perspective in order to displace the power embedded in the framing of the concept of tribe. Thus, the frontier as a concept allows for questioning anthropology's limits by contextualizing the category of tribe within the geographies constituted by colonial and postcolonial states. As a category, the frontier can capture the mobility and flux in the tribal lifeworld and the messy dialectic between the state and its people. Additionally, as a divider between the known and unknown, it reminds nationalist sociology to engage with differences and hierarchies instituted by colonialism and the postcolonial nation-state. Hence, I argue, the frontier concept unravels the ideologies underlying geographies that shape the subjectivity ingrained in "subordinate" social groups, thereby helping us rethink social sciences. ∎

43

Direct all correspondence to Rakesh M. Krishnan <rakeshmkrishnan@gmail.com>

> Feminist Intersectionalities:
New Approaches

by **Sneha Gole**, Savitribai Phule Pune University, India

Agitation to protest violence against women in the city of Gadhinglaj-Kolhapur in Maharashtra state in 2014. Credit: Sanjeev Bonde /Wikimedia Commons.

This paper engages with feminist fields and the reconstitution of the category "woman" in them. I examine how intersectionality and its particular conceptual trajectory in India (as against the context of gender-race in the USA) offers new ways of rethinking the contemporary understanding, by methodologically bringing narrative and memory studies together. I do this through analysis of life narratives of feminist activists (participants in the women's movement) from the state of Maharashtra. I choose to privilege activist voices, as they are the most invested in understanding and operationalizing the subject of feminist politics. The activists I interviewed spanned three generations from one language community; the interviews show that they reframed their own memories in the context of the theory of intersectionality and the way it forces a rethinking of the category of woman.

> **Framing a monolithic "woman"**

Hegemonic colonial and nationalist frameworks imagined the category "woman" in particular ways. In the colonial framework, the status of the "native woman" became proxy for civilization (or lack thereof) and the site for debates around "authentic" "Indian" tradition through nationalist confrontation between colonizers and elite native men. This led to a perception of women as representative of the nation – from Mother India to the valorization of the private against the public as an autonomous zone for the nation. The *savarna*/upper-caste middle-class woman came to be the proxy for the "Indian" woman. The hegemonic nationalist framework continued to signify women as "emblems of culture," but the postcolonial state also addressed women as "weaker sections" of society, situating them simultaneously within modernity and tradition. Women were addressed either as biological reproducers through the institutionalized family planning program or as "non-working" wives through interventions like *mahila mandals* (women's associations organized in the nationalist mode). Lower-caste working-class women as well as regional distinctions as defined within language communities remained invisible and marginal to this postcolonial formulation.

In the 1970s, a new phase of the women's movement rethought these received categories by arguing for experience as a site of building knowledge and foregrounding

>>

44

questions of structural discrimination (understood through leftist ideologies) and violence against women. This phase of the movement challenged "tradition," the private/public divide, and the casting of women as symbols of the nation. It focused on rural and working-class women, highlighting their role as exploited toilers and producers. This challenged dominant nationalist and colonial frameworks but focused on making visible women (in a monolithic way) as subjects of development/modernity, glossing over the inequalities among them.

> ### The move to intersectionality

The 1990s marked a shift, with the nationalist discourse perceiving women through discourses of governance and the women's movement making a shift from *women* to *gender*. This is the context in which intersectionality came to be explicitly operationalized on two levels: as a conceptual tool for analysis and as an organizational strategy adopted by non-party women's groups representing various oppressed groups, such as: Dalits (the word literally means "broken" but has been reclaimed as an identity marker by ex-untouchable castes); lesbians; Muslims (embattled religious minority); and OBCs (Other Backward Classes – lower castes marked by social and economic backwardness). Each of these referenced the experience of a particular intersection and questioned its historical disappearance from the mainstream of feminist politics in India. Though it drew from African-American conceptualizations around race-gender, intersectionality in India had a complex trajectory, since gender came to be rethought along multiple axes – class, caste, tribes, sexuality, disability, language communities, and religious affiliations. Dalit feminist theorizing most sharply underlined the untenability of woman as the feminist subject by centering the different experiences and struggles of Dalit women, especially as reflected in the family-marriage-kinship system. However, caste as graded inequality poses a more complicated picture than the binary of race/class or *savarna*/Dalit and thus needs more probing. In this context, I have argued that the terrain of feminist politics shifted to re-assess the category "woman" in the light of the intersectionality thesis, as evidenced from the shifts in the life narratives of the same activists recounted at different points of time. Consequently, my work shows that intersectionality theory becomes a critical theoretical resource to comprehend ways through which "woman" gets reconstituted through graded inequalities.

> ### The work of narrative and memory

If the 1970s allowed feminist activists to minimize difference arising from their specific caste status and mark a monolithic, universal feminine experience, today's political context and the way the women's question is reframed has influenced these activists to reconceptualize and comprehend their particular caste-class status and its relationship with the institutions of family-marriage-kinship-sexuality, and to reflect back on how these shaped their experiences. Activists, including those politicized in the 1970s and 1990s, recall their childhood and formative years through new prisms, now making sense of their life as women born in a particular caste and how this status shaped life circumstances and opportunities. Even activists whose ideologies had earlier suggested that caste should be perceived as a pre-modern category, and that its use in modernity depicted identity politics and was therefore divisive in creating a nation-wide feminist politics, were now willing to recount their lives by taking into account the various dimensions of the caste-class-gender-sexuality system that defines intersectionality in contemporary India. The story of the self was now remembered anew in terms of caste-class socialization mediated by the institutions of family, marriage, and kinship. Using life narratives as a method helps not only in reinterpreting memories of their lived intersectional realities of social status and privilege but also helps to theorize intersectionality within the Indian context. In the process it is possible to frame new feminist theories regarding the Indian version of intersectionality.

The life narrative method together with memory studies thus help us to see how contemporary perspectives in the feminist field have influenced the reconstruction of a new feminist-activist self; they open up for them and for feminist studies questions of privilege/subordination across various hierarchies in India. Not only does this method point to the significance of feminist reflexivity when it is used to challenge the discourse of "woman" as conceptualized within hegemonic frameworks – colonial, national, or early feminist – but it also helps to bring forth a theoretical understanding of how to comprehend contemporary intersectionality. Also, this methodological engagement allows us to open and recontextualize individual memories to understand shifts in collective politics and outline possible pathways. Intersectional theory can then be perceived as the complex positioning of the gradation of caste groups/religious communities/language communities in contemporary Indian society. Of course, given that these interviews were conducted within one language community our hypothesis remains restricted to an assessment of intersectionality in one region. But it also opens up for discussion the differences and interconnections between such hierarchies that exist within other language communities within India. This project, then, does not offer a template for understanding other regional and political contexts, but rather a way of approaching these questions. This story, which draws from a particular regional field, has many lessons for our understanding of the contemporary construction of woman in India. ∎

Direct all correspondence to Sneha Gole <gole.sneha@gmail.com>

45

> Fraught Fields:
Doing Sociology in Violent Sites

by **Soibam Haripriya**, independent research scholar, India
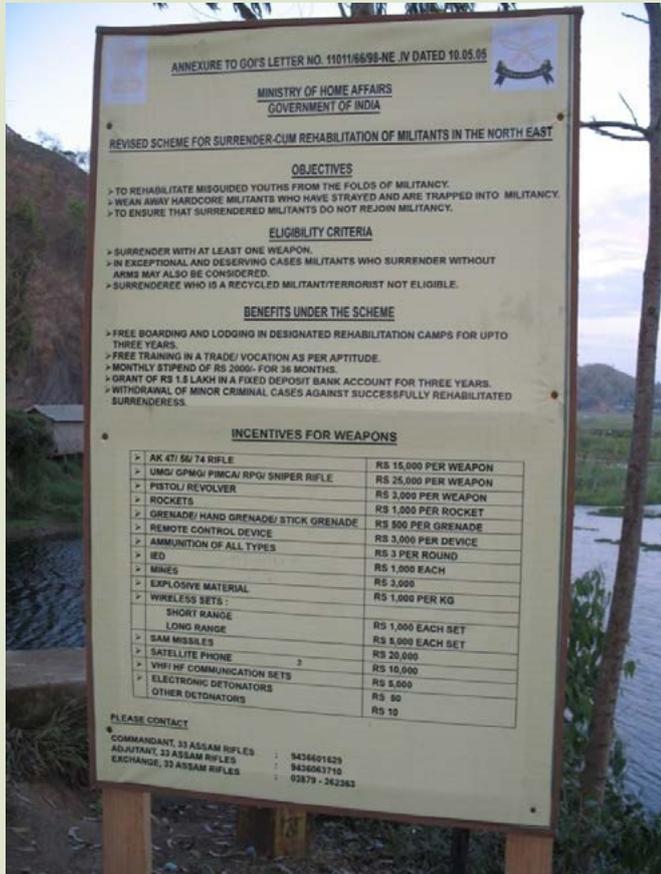
A signboard near Karang in the Bishnupur District of Manipur state, in April 2011. Credit: Soibam Haripriya.

In this essay, I reflect on how sociology/social anthropology should examine state engendered violence. Resistance to the Indian nation-state project is one of the many conflicts that plague the country. The northeastern region, consisting of the states of Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim, and Tripura, shares international boundaries with Myanmar, Bhutan, Bangladesh, China, and Nepal. This region has experienced the fallout of the nation-state project and has been marked by armed conflicts as part of self-determination movements. Consequently, the Armed Forces Special Powers Act, 1958 (AFSPA) is operative in some form or the other in the states of the northeastern region (except for Sikkim). Introduced in 1958 in the then Naga Hills of Assam, AFSPA forms part of the political-administrative apparatus through which the region is governed. Special powers given to the armed forces to kill on grounds of suspicion suspend the right to life. Unsurprisingly, the hegemonic notion of the nation is not shared in this region where AFSPA fosters a culture of impunity, networks of rumor, and mutual suspicion.

In Manipur, insurgent groups have increased from four at the beginning when AFSPA was imposed, to more than 32 groups (excluding various splintered groups). Many research works establish that years of using the military to solve political issues has ensured the impossibility of sequestering violence; it marks every aspect of life such that it becomes meaningless to attribute deaths as caused either by the state or the non-state. The Joint Stakeholders' Report by the UN and the Civil Society Coalition on Human Rights (2016) reveals that 50,000 Indian soldiers are deployed in Manipur for a population below 3 million. The Institute for Defence Studies and Analysis states that between 2000 and 2004, 450 civilians were killed by militants in Manipur. Such statistics present Manipur as a space where the nation-state has failed to impose order. The challenge lies in discerning this space made disordered by state laws/policies.

> Challenges for the ethnographer

Ethnographic fieldwork is central to the discipline as taught in the curriculum in India, where the distinction between sociology and social anthropology is blurred. In the framework of M.N. Srinivas's school of sociology, the field is accessed through ethnography. The researcher participates in the everyday life to extract meanings people give to their lives. This assumes the field as that "natural setting" where the researcher claims familiarity as an insider. The insider/outsider identity is ambiguous (though broadly, in the northeastern region "outsider" refers to those who do not belong to a community of the region). Being a member of the same ethnic community or from the northeast more broadly usually makes one an insider. However, despite being from the same community/region, one can still be considered an outsider based on kin or political affiliations.

One of my research aims in Manipur was to understand how people deal with violent deaths and the culture of fear it engenders. Being a Manipuri, I was considered an insider; however, trust/mistrust became one of the central issues I had to deal with. In negotiating trust, I had firstly to rethink the terminologies employed in the field. Terms such as "informants" and "collaborators" are problematic to employ.

>>

46

Protest actions like this one are common occurrences. Credit: Soibam Haripriya, 2011.

A protest for a young man arbitrarily picked up by the Indian army in 2011. Credit: Soibam Haripriya.

Eschewing terms that evoke pejorative meanings of being agents of the state's military apparatus is the first step to negotiating trust. Secondly, there is a general resistance to research investigation. It is felt that research tools fail to capture the historicity of violence and end up reproducing the colonial ethnographic representation of people as inherently hostile and suspicious of each other and of those outside the community. On the one hand, "outsider" research must foray into such fields as the question of complicity, even if one does not actively consent to the project of state violence. On the other hand, since the field fosters mutual suspicion, access to the field is inevitably mediated by one's identity. As present conditions of the social have been shaped by years of militarization, the adequacy of the tools and methods needs to be questioned. Thirdly, as a supposedly "insider" researcher, I found access to the field more fraught as people categorize kin, friends, and institutions in terms of affinity to either the state or the non-state. Most discussions on field and methods grapples with how to discern whether "informants" are telling the truth. However, in such field sites, the researcher is in a position of reverse gaze; that is, the question of truth, falsification, and trustworthiness – usually applied to the field – now come to bear on the researcher.

> ### The necessity of an interdisciplinary approach

To negotiate access and expand the "field," I took an interdisciplinary approach, supplementing field narratives by incorporating poetry written between 1980 and 2010. In 1980, AFSPA was extended to the whole of Manipur. I used the poetry of the period to understand how the culture of fear is reflected in poetry (other cultural artefacts, such as songs, fiction, novellas are also viable sources that can be explored). For example, I used Thangjam Ibopishak's satirical poem "I want to be killed by an Indian bullet." In this poem, five elements – fire, water, air, earth, sky – come to kill the poet at his home, without any plausible reason apart from the explanation that it was their mission to kill men. The poet requests them to kill him with a bullet made in India. He escapes with his life as they cannot grant him his wish. I analyze the five elements as signifying the anonymity of death squads (to reiterate, it is impossible to attribute violence to the state or the non-state) who pick up their victims or gun them down in their own homes. The lack of a plausible reason to kill implies that one's death or being spared one's life (as in the poet's case) are absurd, arbitrary decisions. The poet's request is a mockery of the nation-state whose claim to bestow the constitutional right to life rings hollow; it expresses anger against the militarization whereby violence intrudes into the domestic.

Such poems make reflections on death accessible in a context where field narratives can be life threatening. This does not mean that anthropologists should discard ethnography for poetry; what I am suggesting are ways to inquire into violence in the absence of tangible evidence. Researchers need to be cautious of methodological hybridity; however, when ethnography itself has been reformulated as a literary genre, there is no reason not to incorporate poetry as a genre that captures the experience of violence that "objective" field accounts fail to elicit. Poetry resists erasures by creating social knowledge that exists alongside facts of the field. Social anthropology thereby needs to examine its research tools, expand its sources, and learn from other disciplines to retain its criticality in sites of state-engendered violence. ■

Direct all correspondence to Soibam Haripriya <priya.soibam@gmail.com>

47

> Stigma and Caste Labor

in Urban India

by **Shireen Mirza**, Indraprastha Institute of Information Technology Delhi, India

Deonar is a suburb of Mumbai which has gained prominence for being the biggest landfill in the city. Credit: Shireen Mirza.

In this paper, I argue that on the one hand the sociology of identities creates caste and religion as distinct social categories pertaining to Hindus and Muslims respectively. On the other hand, systems of capitalism and urbanization conflate practices that define caste and religion through stigmatized labor and spatial segregation. In this context, centering stigma as a category is important because it allows for studying cross-cutting structures and undoing disciplining categories with their colonial-nationalist genealogies. The paper argues that we need new categories to capture complex realities and that, through ethnography, newer categories can be forged.

> The discursive bifurcation of caste and religion

The hegemonic sociology of caste traces the link between stigmatized labor and caste to the religious ideology of the Hindus as well as to traditional Hindu social practices. Caste is seen to draw its legitimacy from ideas like *karma* (force produced by one's action), *dharma* (path of righteousness), and *varna* (order) as pronounced in an ancient Hindu text called *Manusmriti*. These ideas are seen to structure notions of purity and pollution, ritually ranking Indian society into four social groups as well as the untouchable (*avarna*) castes, located outside the *varna*, who carry out "polluting" jobs. Sociological analyses based on discourses of caste purity have been challenged for reinforcing upper caste groups as culturally superior, further enabling their accretion of economic and political power. A discursive understanding of caste as a Hindu social system for the management of ritual purity and pollution is also limited because it fails to provide a useful framework to understand contemporary spatial practices of stigma and caste-based labor across religious groups.

Within the discursive approach, both caste and religion are seen as epistemologically bifurcated as well as different realms. This epistemic bifurcation – of caste as a category that is "internal" to the nation and its politics, and (reli-

>>

48

gious) minority as a category that is "external" and related to a timeless Islamic ideology or adaptations to local social contexts – emerges through a colonial-nationalist genealogy. Within this genealogy, "minority" as a category is synonymous with religion as a domain that emerges through the loss of caste. In the colonial-nationalist genealogy, caste and religion are produced as social domains that are conceptually different in status from political and economic labor categories like class and modes of production. This genealogical bifurcation between caste and religion as incommensurable social categories is a result of the colonial enterprise of classifying Indian society into distinct religious groups such as Hindus, Muslims, and Christians, Therefore, the theorization of caste and religion remains immune to the effects of capitalist-driven urbanization. In practice, however, this binary cannot stand, since non-Hindu groups, including Christians and Muslims, are stigmatized in the same way for performing "polluting" labors. Stigmatized labor deems not just the individual but also the community-self as ontologically impure. This ontological impurity is different from the temporal untouchability available to "pure" castes such as Brahmins, in which the state of impurity is temporary and can be reversed by ritual purification.

Hegemonic sociology is further limited in being able to explain contemporary practices of caste labor because of its presumption of the linear model of social change implicit in modernization theories. This is unhelpful, since economic and social development does not transform the closed system of hierarchy into an open system of social stratification based on individual mobility. Instead, urbanization and capitalist economy have led to the institutionalization of caste, particularly within the sanitary departments of Indian cities.

> **Stigmatized labor and the undoing
of disciplinary categories**

The sanitary department of colonial Bombay municipality, for instance, used the vernacular term *kutchra* to refer to urban waste, in which *kutchra* was seen as emerging from local tropical conditions and native slum areas that required native solutions. Further, it adopted the Persianate term *halalkhore* as the official term for sanitation. Halalkhore refers to lower-caste Muslim laborers for whom all food was lawful. The department also recruited Hindu, Buddhist, Christian, and Muslim formerly "untouchable" castes, whose "traditional" occupation was seen as cleaning, sweeping, animal slaughter, and the removal of refuse. Recruitment of castes within the municipality locked caste identities into sanitary labor based on the claim that pollution is embodied within caste identity, making caste labor different from wage labor performed as part of an economic transaction.

In Deonar, the biggest and oldest landfill in Mumbai city, built by the colonial sanitary state in 1899, the informal labor of waste picking is done by the Dalit Hindu Matang sub-caste as well as by Bihari Dalit Muslims. It is difficult to distinguish a Hindu Dalit waste picker belonging to the Matang caste from a Muslim Dalit waste picker when they are picking waste in the Deonar landfill. Members of both communities return from the landfill carrying white plastic sacks filled with polythene covers, glass bottles, discarded shoes, and clothes on their backs. Each person carries four to five bags of what they refer to as *maal* (literally booty, can also be understood as resource) and a metal sickle called *akdi* to dig through the layers of waste. A torch is tied to the head, and discarded socks are worn over thick boots to prevent being pricked by discarded syringes and broken glass. Common here is the labor of working with the excesses generated by capitalist cultures of accumulation and discard that produce landfills as segregated neighborhoods through the idea of elimination and disgust towards "bad" odor as well as visual excesses.

My ethnography shows that this model of urbanization co-produces combined notions of caste and religion. This can be seen in the place-making histories of Dalit and Muslim settlements around the landfill in Deonar, which was planned as a hazardous belt for the location of "polluted" industries. In the 1947 master plan, for instance, the area is zoned as a *kutchrapatty* (waste belt), to which the Dalit and Muslim working-class population was resettled. Stigma, therefore co-produces capitalist-driven urbanization in ways that reinforces cross-cutting identities of caste and religion.

I understand stigma as an embodied experience of disgust and discomfort when an object, person, or place is experienced as unsettling. Caste can be seen as a subset of socio-political practices of stigma that symbolically express systems of order and classification by defining notions of pollution, contamination, and disorder. This suggests linkages between caste and stigma – in ways that history comes to be marked upon the body. It means seeing filth or dirt not as an objective but as a cultural category, which is interpreted through practices of "othering" racial, ethnic, sexual, and religious minority groups, as part of a broader socio-political milieu.

Foregrounding stigma as a socio-political process allows for a broader framework that revokes the disciplining categories of caste and religion. In order to do this, we need to move beyond received categories of caste and religion seen as incommensurable, fusing them within the idea of stigmatized labor as a transcendental and yet contingent category that is not divorced from the political. This engenders an important question: do modernity and urbanization imply a universalization of stigma? ◼

Direct all correspondence to Shireen Mirza <shireen@iiitd.ac.in>

49

> Data Gaps Impede
Identification and Prevention of Femicide

by **Myrna Dawson**, Centre for the Study of Social and Legal Responses to Violence, University of Guelph, Canada, Canadian Femicide Observatory for Justice and Accountability, and member of ISA Thematic Group on Violence and Society (TG11) and Research Committees on Deviance and Social Control (RC29) and Women, Gender, and Society (RC32)

The phenomenon of femicide is not new; however, its dramatic rise in international attention is unprecedented, particularly during the COVID-19 pandemic. Paralleling this attention are global discussions about whether to use the term "femicide" to name the problem, how femicide should be defined, whether and how it is distinct from other homicides, and how the differences can be operationalized. A key step in moving discussions forward is to systematically document how killings of women *are* different from killings of men – to identify sex/gender-related motives/indicators (SGRMIs) specific to femicide. SGRMIs identify how violence may stem from perpetrators' misogynistic attitudes adhering to perceived norms about women, including their subordination as the property of – or objects to be used by – men, and the related discrimination, stereotypes, and prejudices that accompany such attitudes.

> Defining and identifying femicide

Two approaches to defining femicide are "all killings of women and girls" or "intimate partner femicide" capturing women killed by current/former male partners. These approaches allow for easy identification but are criticized for being too simplistic by considering only the sex/gender and/or victim-perpetrator relationship to understand a complex phenomenon. To identify additional factors distinguishing female and male homicide, we compared male perpetrator/female victim homicide, which most closely aligns with femicide, to other sex/gender combinations.

We found that SGRMIs were more common in male-on-female killings compared to other homicides, meaning femicides *are* distinct, beyond sex/gender or relationship, at least in the Canadian context. More common pre-incident characteristics included prior police contact, pending/actual separation, prior threats against victims, intimate/familial relationships, and premeditation. More common incident factors included femicidal motives (e.g., jealousy), sexual violence, mutilation, excessive force, and victims left nude/partially nude. The average number of SGRMIs was significantly higher, on average, in male-on-female killings.

> Significant data gaps

Data were frequently missing for key variables, which precluded more concrete conclusions and reduced the potential for research to inform prevention. While information was available for some cases, consistency was weak for the total sample and across sex/gender combinations. For male-on-female homicide, missing data ranged from a low of 3% for victim age to a high of 96% percent for perpetrator history of child abuse. Minimal information was expected for some variables, but not for SGRMIs given their relevance to femicide. For example, despite separation being a well-documented risk factor, information was missing in 66% of cases. Further, sexual violence was missing in more male-on-female killings than other combinations despite its increased likelihood in the former. Missing data was lower for incident indicators compared to pre-incident indicators.

We conclude that it is important to use "femicide" to name and distinguish sex/gender-related killings of women and girls – which is why we use *#CallItFemicide* in our research, education, and awareness efforts. We cannot address a social problem if we do not recognize it for what it is and name it; however, we also argue that we need to identify sex/gender-based elements and measure them consistently. Few empirical studies demonstrate this clearly because of a dearth of reliable data. Our research was unique for its original and ongoing focus on femicide and triangulation of information from multiple official/unofficial data sources. Thus, the broader implications of data gaps identified are even more concerning: data which can enhance the development of informed prevention initiatives targeting femicide, and violence against women and girls more generally, are not being routinely collected by states or their representatives. These data biases are putting the lives of women and girls at risk, underscoring the urgent priority to emphasize prevention as a data collection priority rather than simply administrative needs. Reconceptualizing data collection as a prevention tool must begin at the point of police investigations which will feed into better aggregate-level data, but this requires strong and sustainable collaborations across research, communities, and government.

>>

50

"*The investigatory focus remains on incidents rather than on relationship contexts and surrounding circumstances important to understanding femicide*"

Law and governing bodies are not in the business of conducting research; however, they can learn from those who are, and facilitate evidence-based data 1) by collecting more appropriate information; and 2) by making data accessible to researchers who play a crucial role in understanding how to prevent and respond to violence. Despite efforts, data remain difficult to access and collect locally and globally, especially in some world regions (e.g., South Africa, Latin America) and for some groups of women and girls (e.g., Indigenous, immigrants and refugees, women living in rural and remote regions, women with disabilities). For many countries, basic data collection remains the best-case scenario. Why, when data are important to preventing femicide, and male violence against women and girls generally, are they not systematically and routinely collected?

> "Public patriarchy" and data collection

We argue that one key contributor is the historical and ongoing impact of patriarchal social structures, including the role of historical and contemporary decision-makers for whom the collection of these data was and is not seen as a priority. These decision-makers continue to act as gatekeepers of these data, deciding who and how the data will be used. For example, the criminal justice system is a patriarchal, traditionally masculine institution; the recording of data for police investigations and prosecutions will reflect this fact. Despite feminist research demonstrating importance of understanding relationships between victims and perpetrators in femicide, our study showed that the investigatory focus – as represented by available data – remains on incidents rather than on relationship contexts and surrounding circumstances important to understanding femicide.

The ongoing impacts of this "public patriarchy" and related decisions produce sex/gendered data biases which, intended or not, put women and girls at risk because data have primarily been based on, or generated for and by, men. Data collection instruments initially designed to capture male-on-male homicide cases preclude the collection of important data to prevent male violence against women and girls. If we cannot document femicide reliably, what is the hope of documenting other forms of male violence against women and girls? We cannot do so until there is state and public recognition of femicide as a phenomenon worthy of examination. This requires challenging the entrenched hierarchy of "worthy subjects," which often leaves the victimization of women and girls invisible and some groups of women and girls specifically. ■

Direct all correspondence to Myrna Dawson <mdawson@uoguelph.ca>

Further Reading:
A recent longer piece by the author on this topic is available in English here and French here.

51

> Racism and Anti-Environmentalism
in US Politics

by **Ian Carrillo**, University of Oklahoma, USA, and member of ISA Research Committee on Economy and Society (RC02)

52

In the United States, racism and white supremacy remain central obstacles to resolving collective action problems, with environmental injustice and climate change among the most pressing crises threatening society's well-being. In my article "The Racial Fix and Environmental State Formation," recently published in *Current Sociology*, I elaborate on the relationship between racism and anti-environmentalism in the US political economy. I argue that racial politics are central to the political economy in which environmental policy is made.

Binding together racism and anti-environmentalism in this political economy is what I call "the racial fix," which refers to the idea that race and racism are mechanisms for circumventing forces that might slow or reverse ecological destruction. In particular, elites in industry and government use racism to sow social divisions and to undermine any collective mobilization threatening their pursuit of power and profit.

> The spatial dimensions of the racial fix

In the US, the racial fix operates in three major ways. The first is spatial, in the relationship between race and space determining which populations are targeted to bear environmental burdens. The questions of how race influences who gets to populate the US and where people live in the US are fundamental. Immigration policies historically favored European populations and deliberately sought to achieve a permanent white majority in the US. Historical and contemporary racial segregation in urban, suburban, and rural areas means residential patterns have been and continue to be racialized.

The racism shaping residential segregation and immigration has implications for environmental justice. Segregated communities of color become sites for undesired waste storage and other hazardous activities, as white-majority populations enjoy cleaner environmental ameni-

>>

ties. Meanwhile, white majoritarianism blocks communities of color from using democratic means to address environmental problems.

> ## The racial fix as political

The second feature of the racial fix is political. In the US, democratic institutions advantage white populations and disadvantage populations of color. This is due to the long-standing entanglement of racism in US political development and contemporary shifts in US politics. For instance, the Electoral College – whose members elect the president – was founded to shield enslaver and slave industry interests and to restrict popular democratic participation. The US only became a racially inclusive democracy in 1965, but since then racist politicians have steadily sought to limit the political rights of people of color. These politicians push mass incarceration policies that imprison and disenfranchise people of color, while also passing voter suppression laws based on the racist myth that people of color and immigrants engage in voter fraud. On a structural level, political institutions still have a pro-white bias. The political preferences of white (especially rural) voters are over-represented in the House of Representatives, the Senate, the Electoral College, and the Supreme Court – whose justices are appointed by senators and the president. The consequences of these white structural advantages have become glaringly clear: the Supreme Court recently gutted the 1965 Voting Rights Act, Congressional districts are increasingly drawn to tilt the playing field in favor of conservative white voters, and Congress has struggled to counteract anti-democratic trends in state legislatures.

The political aspect of the racial fix is critical to environmental policy since most racist politicians *also* hold anti-environmental views. In this conjoined viewpoint, racism is a tool for blocking the creation of public goods, like an equitable and stable environment. This is similar to "dog-whistle" politics, where politicians use racially coded language to demonize people of color and to delegitimize government programs. While dog-whistle politics initially focused on welfare policies, such racial framing was eventually extended into the sphere of environmental policymaking. In this way, racial resentment and hostility to environmental protection overlapped in the attitudes of conservative politicians and judges, as well as the conservative white voters whose views are structurally over-represented in US politics.

> ## Racial identity politics and individual psychology

The third feature of the racial fix involves the relationship between racial identity politics and individual psychology. This relationship is crucial for shaping public perceptions of government programs for environmental and climate protection. Several trends in the last two decades have strengthened the association between white identity politics and anti-environmental attitudes. First, following the 2008 election of Barack Obama, conservative leaders and politicians worked to delegitimize Obama's policies by branding him as an ethno-racial, religious, and foreign "other." These efforts racially primed white voters to not only reject the Affordable Healthcare Act, but also the Paris Climate Accord and the Environmental Protection Agency more broadly. Second, conservative leaders stoked white racial anxiety related to shifting demographic trends, with whites projected to no longer be a majority of the population. This racial threat further reinforced the linkages between white identity politics and anti-environmental attitudes. For instance, prominent anti-environmental politicians, like Donald Trump, won political office by fanning the flames of nativism, racism, and fears of "white replacement." These racist efforts deeply appeal to base emotions around fear and group threat, thus linking individual psychology to a political economy oriented around not solving environmental and climate problems.

At the center of this political economy are elites in industry and government who use race and racism to stymie any collective action that might engender environmental and climate protection. This elite strategy has a long history in the US. For instance, following Bacon's Rebellion – a 1676 multi-racial labor uprising – elites enacted racial laws that divided white and Black workers, thus creating obstacles for future cross-racial labor solidarity. Elites unfortunately still use this divide-and-conquer playbook today, in the service of perpetuating environmental and climate injustices. Like past elite projects that destroyed public goods, these efforts hurt people of color first and worst, but eventually also harm the lives of white people. The planetary destabilization caused by environmental injustice and climate change exemplifies how white supremacy undermines its material conditions and cannibalizes its own supporters. To preserve a stable environment and climate for future generations, it is necessary to neutralize the racial fix, repair and restore injured communities of color, and institute robust climate and environmental programs grounded in racial and class justice. ■

53