

The Functioning of Gender, With Special Reference to the Global South

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Abstract: This paper proposes theorising gender through complementary sets of behavioural prescriptions or norms rather than by a focus on women (and men). It posits the idea that gender is integral to a disciplinary regime aimed at producing social order, with masculinity at its centre. What appear as advantages to men simultaneously pressure them into conforming to their cultural and socio-economic group's notions of masculinity including exerting control over wives and offspring. Four complementary foundational norms for both sexes are identified. They evolved during the nineteenth-century in industrialised Europe and were spread to the global south first through Christianisation and colonialism and later through gender and development programmes and mass/social media. These norms are first economic support for sustaining material life versus social reproduction and caring; secondly, male disciplining of (submissive) wives and children; thirdly heterosexuality, marriage and the biological production of children; and fourthly men's protection of vulnerable women and their ascriptive (ethnic/religious) group for the context, as also the state. These do not determine behaviour but oblige everyone to consider them in negotiating their own conduct, with the most insecure interpreting them most narrowly. The ideology of masculinism supports the regime at the macro level, while also influencing individual behaviour at grassroots. Drawing on cases from my work in Latin America and Sub-Saharan Africa, I show how this functions in practice in relation to how men treat each other and how it impinges on familial gender relations, with particular emphasis on Sub-Saharan Africa, and especially Kaduna, Nigeria. I also discuss how supporting men to delink their behaviour from the norms of masculinity (thus defying masculinism) can make a positive contribution to family life and I posit the importance of further research on the effects of the norms for both sexes to improve our understanding of the functioning of gender.

Keywords: gender norms, masculinism, masculinity, coloniality of gender, Sub-Saharan Africa

1. Introduction

The term gender serves as a theoretical lens to differentiate biological sex from socially-constructed behaviour (Oakley, 1972: 16). As the chief victims of gender power relations women have become the major focus of efforts to improve their situation while men have been viewed as the privileged sex, who have arranged the world for their benefit at women's expense. This suggests that gender is a universal and that men and women form monolithic blocks, ignoring the effects of socio-cultural and politico-economic positionality and so hampering our understanding of the intersecting disadvantages of many men.

In this paper my focus is not women's issues but rather the functioning of what I call the gender regime, which I view as primarily aimed at preserving social order – that is, as serving as the foundation of Foucauldian disciplinarity (Foucault 1991). The point is to reveal a deeper understanding that will also provide an approach to transforming relationships in a way that focusing on women alone cannot.

My premise is that the focal point of the gender regime is masculinity — that men's apparent advantages dupe us into assuming this is the reality and thus into viewing their negative behaviour as easy to change. The UN's He For She movement,¹ for instance, aspires to persuade men to treat women better, to help them in the home and eschew violence towards them. However, many men are too insecure to withstand pressures to uphold normative expectations; to compensate they may be strict and even violent at home. They may mock others deemed too egalitarian, pushing them towards more deleterious behaviour. My work as a gender trainer showed this to be common. For instance, a project with youths in the Ecuadorian Andes revealed how dominant males capable of attracting multiple sex partners tried relentlessly to pressure their peers into doing the same (Harris, 2006).

In this paper I suggest that the pressures men feel to comply with local norms of masculinity represent major obstacles to gender transformation. They are products of that political ideology termed masculinism which sustains structural inequalities globally (Section 4) (Runyan and Peterson, 2014). This does not exculpate individual men for pejorative behaviour but rather implies that transforming gender relations requires unravelling the regime itself, while also deconstructing the signifiers man and woman as containers of normative

¹Heforshe.org

elements usually subconsciously understood but rarely articulated. It also means focusing on the complementary masculine/feminine norms that form the bedrock of most societies (Section 3).

To clarify their genealogy I start with a brief history of western gender followed by its imposition on a culturally distinct global south. Section 3 unpacks the black box of gender through normative elements distilled over decades of grass-roots education and research in Europe, the Americas, Asia, and especially Africa. Section 4 links these to masculinism, showing the harmful character of this ideology. Section 5 utilises data collected during grass-roots education projects in Ecuador, northern Uganda and Kaduna, Nigeria, through action-research based participant observation. This reveals how men's struggles to negotiate the norms push them into often-harmful treatment of women, harming the men themselves and facilitating violence. It also shows that delinking from the norms can reverse this.

2. Gender – its history and geography

The uninterrogated acceptance of male superiority obscures distinctions among men from different socio-cultural groupings rarely understood by the white middle-class scholars who overshadow the field and whose work is therefore less relevant to other cultures. It also derives from a lack of understanding of the history as well as the geo-cultural and geopolitical power relations that have produced the current global environment, including western domination of political economy and gender ideology.

2.1 Its history

My narrative begins after 1700 in Europe when according to Thomas Laqueur (1990) the previous fluid understanding of the distinctions between males and females shifted to the notion that men and women comprised two biologically distinct and fixed entities. With the womb seen as qualitatively distinct from male genitalia, women came to be viewed as largely ruled by their uteruses, their lives revolving around pregnancy and childbirth.

The first major consequence was that the notion of companionate marriage began to supersede that for economic benefit and the continuation of the family, leading to the conceptualisation of romantic love as its ideal basis. Equally important was the introduction of heteronormativity, where, as we learn from Randolph Trumbach (1998), the earlier acceptance of adult men taking the active role with passive youths, as long as this was combined with a socially-approved cross-sex marriage, ceded to the concept that all same-sex erotic desire deprived men of appropriate masculinity. Meanwhile women's homoerotic behaviour was less visible and so generally ignored.

The industrial revolution largely shifted 'productive' labour from the family unit to an external workplace, pushing women into the home and confining them to 'reproductive' activities, legitimised by the new ideas concerning female biology. This occurred just when under industrialising capitalism money was becoming increasingly important in power relations as also a crucial element for sustaining material life since fewer necessities were being produced in the household. At this time too men were first pressured into assuming the entire burden of their families' economic support by engaging in waged labour, for which they were rewarded with enhanced control over wives and offspring. However, those men unable to manage this, for whom their wives' labour and sometimes that of their children too were critical for family survival, became especially vulnerable, often leading to domestic violence (Davidoff and Hall, 2002). Thus, between 1700 and 1900, with the shift to modernity in Europe, gender-based inequalities increased significantly.

By 1900 the set of norms we now associate with the terms man and woman had been established in their most rigid forms. While over the ensuing century the associated practices were generally relaxed the underlying norms have changed little (Section 3). Meanwhile, this essentially middle-class white European ideology was carried to the rest of the world along with Christianisation and colonialism (Harris, 2017). Neocolonialism supported the continuation of this process and, especially in the form of gender and development programmes, continues to do so, making gender integral to the ongoing project of coloniality (Lugones, 2010).

2.2 Its geography

When missionaries and colonial agents arrived in Sub-Saharan Africa, they found qualitatively distinct and far less rigid gender prescriptions than at home, with biological sex less salient for power relations than age and

seniority (Oyěwùmí, 1997). Furthermore, material needs were largely met through domestic production with women playing a major role; since Africa is gerontocratically structured, older women wielded power over younger men, including adult sons (Harris, 2012, 2017; Silberschmidt, 1999).

Missionaries attacked local ideas of personhood from multiple perspectives, starting with dress and marriage. Female converts were expected to submit to their husbands as Christ's representatives and could not easily divorce them, making it hard for them to escape abusive relationships (Harris, 2017). Meanwhile, colonial officials offered employment to men alone (Vincent, 1982) and refused to acknowledge women's political designations, for instance among the Yoruba where female leaders held titles paralleling those of men (Oyěwùmí, 1997). All this changed grass-roots gender relations, later supporting the structuring of the independent states around male advantage, including political representation (Anunobi, 2002).

Asian male/female relations were also influenced by western ideology, even in countries such as Thailand and China which were never formally colonised. However, in most of these cultures sex was crucial to power relations albeit in combination with gerontocracy. In India colonialism increased inequalities for younger women, the non-heteronormative or hijra, and scheduled castes/tribes (Oldenburg, 2002). However, the power of mothers-in-law continued, preventing youths of both sexes from determining their own futures, including choice of profession and marital partner, since in most families major decisions rest with the elders (Harris, 2019).

Overall, a major impact of western influence was to raise the status of men compared with women, who were subjected to considerably more limited behavioural prescriptions than previously, while simultaneously making men vulnerable through the norm of breadwinning. Moreover, the lack of respect to women shown by white men encouraged southern men to copy this (Oyěwùmí, 1997).

Western gender identities were never fully adopted in the global south and despite influences from television and social media as also from gender and development projects that promote western norms to southern communities (Wendoh and Wallace, 2006), this has not changed. The result is that to understand such societies requires theory specifically focused on their own social organisation, including the mutual constitution of gerontocratic and gendered power relations (Harris 2012) although the foundational norms now play a major role in most societies.

3. The foundational norms of gender²

These norms enforce a rigidly binary structure aimed at disciplining populations into conforming to one of these two positions irrespective of self-identity. They demand distinct but complementary behaviour from each sex, the details differing among and within geopolitical cultures. Here I mainly focus on their functioning in Sub-Saharan Africa while also addressing implications for other parts of the world. The foundational elements comprise material support, social reproduction, family discipline, sexuality, marriage and children, the protection of the family and by extension other relevant entities, including the state.

While this is not deterministic, everyone must deal with these prescriptions, any leeway depending on capacity to negotiate social pressures and thereby manage one's self-presentation. However, nowhere have these norms been reproduced exactly, facilitating variations in gender performance even within Europe and the white-settler societies. Moreover, the fact that some form of these elements exists in all but the most isolated indigenous groupings should be understood as an effect of western hegemony rather than of the universalisation of gender. Of course, the above elements deal only with complementary male/female norms; there are many others that apply solely to one sex.

3.1 The first normative element

The first and pivotal element under the capitalist system is the male breadwinner, complemented by the female homemaker. This makes men solely responsible for their family's material needs, while women act as housewives and carers, a division of labour that in late nineteenth-century Europe became crucial for social respectability (Davidoff and Hall, 2002).

² The material in this section is largely based on Harris (2018).

This element accompanied missionaries and officials to the colonies, where capitalist-based waged labour was introduced for men. This was particularly clearcut in Sub-Saharan Africa, reinforced by the early church schools where academic subjects were the sole purview of boys, girls being mainly taught domestic skills (Labode, 1993). The result was to establish men as controllers of material resources even in rural settings where women were the main farmers.

Women's contributions allowed the colonisers to pay African men low wages (Silberschmidt, 1999), constructing them as inferior through the vicious circle represented by the establishment of the breadwinner norm along with the refusal to pay them sufficient to be able to comply with it. When following World War II Nigerian railway workers struck for equal pay with their white colleagues, the response was that they did not deserve this because they were not their families' sole providers (Lindsay, 2007). Their colonial overlords thus concealed their racism behind notions of appropriate gendered behaviour.

While today the male-breadwinner norm has become crucial to African, as also Asian, manhood, only a tiny fraction can ever achieve this (Harris, 2016, 2018). Even in the west, few families can meet their needs on one income alone, so this norm has been stretched in practice by the high levels of women in the labour force, while many men hide their failure as breadwinners by explaining away their wives' earnings as pin money (e.g. Vera-Sanso, 2000).

3.2 The second element

The second element concerns social control which the head of the family (conceptually a male, although women may assume this position in practice) should be capable of exerting over his female partner/s and, especially in gerontocratic societies, even his adult offspring. This element makes the man reliant on fulfilling the first one since it is hard to enforce this on authority alone (Harris 2012). Therefore, the notion of the breadwinner as a uniquely masculine attribute, with the housewife dependent on her husband for all her and her children's material needs, creates a hierarchy that positions the *pater familias* as a (hopefully benign) dictator to whom his wife and children are expected to show obedience and/or submission. It legitimises deploying domestic violence, if necessary, to keep control. This element thus places masculinity at the centre of social order.

3.3 The third element

This concerns marriage, biological reproduction, and with this sexual identity/practices.

3.3.1 Marriage and children

Here men must demonstrate their virility, women act as passive partners, with few if any pre-marital contacts. Both to sustain male control and, where relevant, to ensure that all progeny are the husband's biological offspring, female unfaithfulness is taken very seriously, emasculating men by turning them into cuckolds. Conversely, the ability to attract multiple partners enhances masculinity.

In Sub-Saharan Africa polygyny has long been an important status symbol for Christian as well as Muslim men, with marriage formalised through the payment of bridewealth. Neither was acceptable to the missionaries who tried unsuccessfully to stop the latter and made monogamy a condition of baptism. Moreover, although children are essential to marriage and lineage continuation, in this sub-continent, unlike most other societies, social largely trumps biological fatherhood (Dube, 1997; Harris, 2016, 2017; Silberschmidt, 1999).

Since virility cannot be directly observed, it is demonstrated by begetting children, while becoming pregnant shows women's compliance with family expectations (Mumtaz *et al*, 2013). Even in the west today a successful marriage is expected to produce offspring, putting pressure on the childless to invest large sums in IVF and/or surrogacy (Korb, 2012) and recent European-Union policies veer towards white, middle-class pronatalism (Repo, 2016).

In the absence of relevant government programmes, in the global south children are essential for old-age support (Harris, 2016, 2019; Mumtaz *et al*, 2013). Many Asian societies embrace patrilineality and patrilocality, so parents rely on sons for their future survival. In such settings too older women's power position largely depends on their capacity to control their adult sons and daughters-in-law, making son preference crucial for their economic maintenance and social status.

3.3.2 *Sexuality*

Commensurate with the post-1700 shift towards heteronormativity, in the west this aspect of the third norm remains dominant, unlike in most other societies. In Sub-Saharan Africa lineage-appropriate marriage is expected of all, contracted more for family than for the individuals concerned. The acceptance of both women's pre-marital sexual experiences and social fatherhood explains the relatively relaxed approach to wives' extra-marital affairs, at least in pre-Christian times. Moreover, the fact that most people's days are spent in same-sex company facilitates extra-marital homoerotic relations for both sexes (Kendall, 1998; Rao, 2020).

In Asia too, non-heteronormative relations have long co-existed with a formal cross-sex marriage (ICRW, 2002; Krishnan, 2014). Here, where biological fatherhood is crucial, female virginity at marriage expected, and young women's mobility highly constrained, pre-marital same-sex relations are far less risky than cross-sex ones. Despite the colonial legacies of anti-homosexual legislation in India and Sub-Saharan Africa, extra-marital homoerotic affairs continued unobtrusively behind the scenes. However, recent pressures from new religious sects towards companionate marriage, along with the transnational LGBT movements, have helped pressure people into opting for a particular sexual identity (Rao 2020).

3.4 The fourth element

The fourth element concerns the brave and strong male protector of the weak and vulnerable female and her children. At its most basic this relates to men's duty to prevent outsiders from harming their families (*e.g.* ICRW, 2002). However, it becomes crucial in times of violent conflict, when men are charged with protecting the state and/or their religious or ethnic group, and so can be condemned for failing to do so. This justifies imprisoning or even killing as traitors those who do not provide such support and legitimises men's military conscription (Dudink and Hagemann, 2014). While women may of course be violent themselves they are conceptualised as normatively inherently passive and peaceful and so are more likely to be chastised than praised for violent behaviour.

Pressures related to this element have significantly facilitated public violence, including war-making, since otherwise raising an army or even gaining pro-war consensus would be much harder (Dudink and Hagemann, 2014; Runyan and Peterson, 2014). The legitimising of men's use of violence implied by this element further enables domestic abuse.

4. Masculinism

The above norms also underpin the global political economy in the shape of the ideology that feminist international-relations theorists term masculinism (Runyan and Peterson, 2014). Here the norms are turned into political principles, privileging all associated with the superior masculine over that linked with femininity. The first element positions the economy above human and ecological welfare and caring, competition above collaboration both domestically and internationally (Runyan and Peterson, 2014). The second element allows elites and political leaders to present as all-knowing fathers to their populations, thereby limiting democratic participation, while the third element permits law-making around sexuality and reproduction and the fourth privileges militarism and thus war-making over negotiation. Moreover, masculinism is crucial to neoliberalism, supporting further accumulation by the super wealthy through legitimising callous entitlement and so facilitating their dispossession of the resources of the masses (Runyan and Peterson, 2014). Politically it has created the populist anti-establishment movements responsible for Brexit and the election of Trump as well as of the BJP party in India, by exploiting feelings of emasculation of working-class white men and Hindus respectively (Anand, 2007; Walker and Roberts, 2018).

Masculinism also sustains patriarchal institutions, both official ones, such as the UN and national agencies, and unofficial ones, including the family and religious establishments. Together, masculinism and patriarchy legitimise individual sexism. This helps explain how national laws that mandate gender equality and the calls from the UN to promote this have produced relatively little substantive change.

Finally, masculinism legitimises pressures on individual men to comply with the norms outlined above while neoliberalism currently prevents even many middle-class men from attaining stable employment commensurate with their social and educational status (Walker and Roberts, 2018). Meanwhile, individuals are still held

responsible for failure to achieve this, effectively emasculating them. This leaves men with minimal chances of a satisfactory outcome.

5. The functioning of the gender regime

Strongly supported by masculinism, the norms outlined in Section 3 form the basis for both the ideological and the practical functioning of the gender regime. Since they make men dependent on women's conformity, they are less one-sided than they might appear. In fact, women may hold considerable power in terms of their (usually tacit) agreement to present an image of submission despite privately being more dominant than their husbands. This is especially true in much of the global south where image is prized over authenticity and gendered practices differ greatly from public discourse. Meanwhile, the pressures on men to maintain their masculinity by complying with the above elements of the norms are responsible for much of the oppression of women and children, as well as of other men (Walker and Roberts, 2018).

Many husbands I knew in Kaduna, Nigeria, struggled to support their families as daily labourers. When this failed their wives would commonly blame them for not fulfilling their obligations, scolding them until in exasperation they would beat the women to demonstrate their capacity to uphold the second norm at least. The men saw the ability to earn money as heroic, so difficult was it to achieve. Nevertheless, rather than blaming the norms that prevented them from allowing their wives to work, some of the poorest bolstered their masculinity through polygyny and high fertility, showing conformity with the third element of the norms while further impoverishing their families (Harris, 2016, 2018).

As youths some had tried to salvage their masculinity by participating in the sectarian clashes of the early twenty-first century since by turning violence into an appropriate resource for men, the fourth norm legitimises its use domestically and at community level, thus exposing them to the risk of being killed. Much of this occurs because this norm allows them to avoid emasculation due to their incapacity to comply with the first three (Harris 2016).

Some indication of what might be achieved by tackling these issues through supporting men to deconstruct the norms they are pressured into living up to can be gleaned from my grass-roots education projects where getting those concerned to view their own situations through the lens of masculinity sometimes produced quite radical change. For instance, in the Ecuador project (Introduction), the male youths themselves identified alcohol consumption and multi-partner unsafe sex as problems. Role-playing showed us all how they pressured each other into engaging in these through threats of emasculation. Getting a formal agreement from all the village youths to stop this, thereby delinking these from masculinity, significantly changed their lives and greatly improved relations with their girlfriends as a later evaluation demonstrated (Harris 2006).

Similarly, in post-war northern Uganda men who had been insisting on their wives and older offspring obeying them unquestioningly, after long discussions among themselves realised that family-level decision-making could benefit everybody (Harris 2014). In Kaduna role-playing regarding how youths were pressured via masculinity into joining in sectarian riots revealed how vulnerable this could make them. Our participants found ways to resist this and voluntarily worked with their peers to help them do the same. In the 2011 post-election riots, these groups remained peaceful; they even tried to stop others in their neighbourhoods from engaging in the violence (Harris, 2018). Thus, doing away at least partially with the power of the norms, thereby also defying masculinism, can significantly improve the lives of both men and women.

6. Conclusion

Exploring the capacity of the norms to pressure men into problematic behaviour suggests the need to reconceptualise gender issues as a component of (Foucauldian) disciplinarity aimed at keeping everyone in their allotted places for the benefit of elites. This suggests that a focus on equality alone cannot be truly transformative.

The four normative elements outlined in Section 3 break open the black box of gender-power relations thus revealing how they give men the upper hand, while simultaneously pressuring them into compliance with the norms, on penalty of emasculation. Due to the first norm, despite high levels of female employment women are still not viewed as legitimate members of the workforce nor men as legitimate homemakers (Runyan and Peterson 2014). Although in certain social groups norms two and three are no longer so important, some

pressures towards these remain. Meanwhile, masculinity along with institutionalised patriarchy and individual sexism continue to flourish to the detriment of us all.

My projects have shown that removing the pressures of masculinity can produce major social improvements, although more research is needed to demonstrate the utility of this approach. For it to work would require dismantling the normative elements described in this paper, thus transforming the signifiers man and woman into a completely different understanding of the meaning of being human, one perhaps aligned with the more egalitarian cultures of the pre-contact world. This would simultaneously imply doing away with the gender regime itself, thus taking this conceptualisation out of the realm of theory into that of advocacy.

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