
Original Article

The Europeanization of gender equality policies: A discursive–sociological approach

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Abstract This article argues that a discursive–sociological approach to study Europeanization is particularly apt for understanding the dynamics of policy change in Europe. It does so by bringing closer the agenda of discursive institutionalism (DI) and gender policy analysis, drawing upon the recent sociological and discursive turns in the study of the domestic impact of Europe, and the long-term interest of gender policy analysis for discursive framings, norm diffusion, actors' interactions and EU soft policy instruments. Challenging the limitations of Europeanization studies that only focus on convergence, the article explores the contribution that both Schmidt's DI and discursive gender approaches make to the understanding of policy change in Europe. While seeing the two approaches as complementary in the study of Europeanization, the article discusses the added value of gender approaches for improving our understanding of policy change in Europe.

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Introduction

Europeanization studies and gender policy analysis are two fields within political science that have often moved on parallel tracks, only occasionally meeting. Yet they can be mutually enlightening, and, if brought together, they could improve the understanding of policy change in Europe. This article brings the two research agendas closer in supporting the argument that a discursive–sociological approach to study Europeanization is particularly apt to grasp the complexities of policy change in Europe, that this approach has been applied rather successfully in the field of



gender equality policy and that therefore there is reason to believe that insights from discursive–sociological analyses of the Europeanization of gender equality policies could successfully inform other policy domains.

Since a ‘discursive institutionalist’ perspective to study policy change in Europe has been developed in the last decade by EU political thinkers such as Schmidt (2002, 2006, 2008, 2010a) and Schmidt and Radaelli (2004), we will discuss their approach and identify synergies and differences with the gender and politics literature that has analysed gender policies through discursive methodologies (Bacchi, 1999; Ferree *et al.*, 2002; Kantola, 2006; Verloo, 2007; Lombardo *et al.*, 2009). We claim that discursive analyses of gender equality policies are allies to discursive institutionalist analyses of Europeanization in further elaborating the potential of the latter for understanding policy change in Europe. Yet, they present some differences from discursive institutionalist analyses that can enrich the explanatory potential of discursive institutionalism (DI). Schmidt considers discourse as a key mediating factor that helps explain the impact of Europeanization on national policy, mainly in the sense of its rhetorical function, coordinative policy and communicative political discourses.

Discursive analyses of gender equality policies share some aspects with discursive institutionalists like Schmidt, such as exploring the cognitive and interactive dimensions of discourse and bringing into view meaning and contestation in discourses (though the latter is particularly central to gender analysis). But discursive gender analyses are also characterized by specific features, such as a focus on unveiling the normative underpinnings of discourses (Bacchi, 1999; Ferree *et al.*, 2002; Lombardo *et al.*, 2009), addressing not only intentional but also unintentional framing efforts that show deeper normative assumptions (Bacchi, 1999) and developing specific methodologies that allow researchers to map policy frames and their underlying norms (Verloo, 2007). This attention to the norms embedded in policy discourses and present in researchers’ standpoints is a specific characteristic of discursive gender policy analyses such as Bacchi (1999) and Verloo (2007) that differs from discursive institutionalist analyses of Schmidt and Radaelli.

The approach we propose for understanding Europeanization is not only discursive but also sociological. Our use of ‘sociological’ encompasses the concept of ‘sociological institutionalism’ discussed in Schmidt (2002, 2010a), but is also broader – and in this respect different from the latter. The sociological dimension for us means: (i) attention to actors and their interactions in producing changes (relations between institutional and civil society actors, advocacy networks and alliances); (ii) sociological institutionalism (cultural norms and processes of norm diffusion as in Schmidt); and (iii) attention to ‘soft’ policy instruments as rules capable of producing policy change in Europe. To elaborate on the proposed discursive–sociological approach to study Europeanization, we will address in this article only the contribution of gender policy analyses that are focused on discursive and sociological aspects, to Europeanization studies centred on discursive–institutionalist



frameworks. Therefore, we will leave out – despite its relevance – the contribution of Europeanization studies to (EU) gender policy studies.

First, the article introduces the concept of Europeanization, and contrasts an approach to Europeanization dominantly framed in terms of convergence with the EU norm, that leaves a number of unanswered questions, with approaches such as DI and gender policy analyses that manage to address some of the pending questions on the agenda of Europeanization by giving increased relevance to the role of policy actors and discourses. It then discusses the features of a discursive–sociological approach analytically exploring and distinguishing the features of Schmidt’s DI and those of gender discursive–sociological approaches. The article concludes by arguing in favour of discursive–sociological approaches – where gender approaches complement DI – being particularly apt to improve the understanding of policy change in Europe, notably in times of lowered adaptation pressure in many policy fields and increasingly contentious usages of Europe due to the consequences of the debt crisis for EU integration.

Europeanization: Concept and Questions on the Agenda

Europeanization is a widely discussed concept. It has generated plenty of definitions (see Börzel and Risse, 2000; Olsen, 2002; Radaelli, 2004) and operationalization attempts, whether as a new theory, a ‘catch-all’ concept, or a principle for organizing existing theories of European integration and empirical findings (Baisnée and Pasquier, 2007; Graziano and Vink, 2008). Despite the concept’s lack of clarity and its broad scope, Europeanization studies have contributed to changing the lenses through which European integration is analysed, shaping the scholarly interest in Europe’s ‘domestic impact’. This interest has mainly developed from a top-down perspective, focusing on processes of internalization and norm adaptation, often with a premise: convergence is the rule, whereas increased variety/divergence is the exception.

The concept of Europeanization was developed in the 1990s to deal with the European integration process’ implications for national political systems (Andersen and Eliassen, 1993; Mény *et al*, 1996). Studies adopting this top-down perspective frequently assume as main focus the adaptive response of national systems to EU input. This is particularly the case in studies on the impact of European integration in those countries exposed to the unprecedented conditionality of the EU’s Eastern enlargement (Schimmelfennig and Sedelmeier, 2005; Sedelmeier, 2006; Falkner and Treib, 2008). The domestic impact of Europe is therefore often analysed as an independent variable that helps explain policy change, with works limiting their focus to compliance with EU law, institutional transfers and norm adaptation. Although coming from a variety of theoretical–methodological backgrounds, these approaches share the assumption that policy change results from a



‘downloading’ process from the supranational to the national level (Andersen and Eliassen, 1993). Although it is acknowledged that this process might be precarious due to strong institutional misfits, the dependent variable remains the national systems’ degree of convergence with the EU model.

Despite their pioneering and explanatory contribution, Europeanization studies that focus on the premise of convergence leave a number of questions on the agenda: What does it mean to Europeanize policies if the result is divergence from – rather than converge with – the EU norm? How are EU norms framed in national contexts and how is the EU discourse used by political actors? Who are the actors of change and through which dynamics do they produce change in domestic contexts? And if the EU has no binding but rather soft measures in policy issues such as domestic violence, to what extent does it impact domestic policy? On the background of these questions, there is a more general ‘big’ question about why and how does policy change occur in processes of Europeanization.

Both discursive institutionalist analyses of Europeanization and gender policy analyses are attempts to address these questions. The conceptualization of Europeanization as convergence with the EU norm has increasingly been, both theoretically and empirically, questioned in EU studies (Featherstone and Radaelli, 2003; Caporaso, 2008; Graziano *et al.*, 2011b), as it became clear that Europeanization, rather than being a proxy for convergence, was often a synonym for political contention, competing discursive patterns, and institutional ‘misfit’ (Lehmkuhl, 2000; Börzel and Risse, 2003). The need to grasp the increased diversity of the EU after the Eastern enlargement has further encouraged analyses of the EU-member states’ (MS) relations that provide more sophisticated and realistic frameworks for understanding such interactions. Far from constituting a united field with a shared research agenda or methodology, these analyses are nevertheless characterized by a more comprehensive approach that takes into account institutional, discursive and interactional factors, thus placing most of these studies at the intersection between different types of new institutionalism (Radaelli, 2000, 2004; Schmidt, 2002, 2006, 2008, 2010a; Woll and Jacquot, 2010).

It is especially the DI developed by Schmidt that brings further elements for addressing some of the unanswered questions of Europeanization. First of all, in an effort to understand divergence as an outcome of European integration, Schmidt (2002) considers discourses as having a key role for understanding the dynamics of policy change in Europe. This emphasis on discourses as key mediating factors provides new analytical frameworks for tackling the problematic issue of divergence as an outcome of European integration by looking at endogenous factors for explaining change. Second, Schmidt contributes to analytically distinguish the different types of new institutionalism – that have been influential in recent studies on Europeanization – and draw the borders of ‘DI’. Third, Schmidt’s (2008) concept of discourse is dynamic – an interactive process of policy coordination and communication – and helps to explain how EU norms are



generated and legitimized at the domestic levels through the framing and reframing of cultural norms (Schmidt, 2002). And fourth, she develops through DI a ‘framework for analysis capable for endogenizing agency’ that tries to explain why and when political actors (re)shape institutions and (re)conceptualize their strategic interests by looking at the ‘timing of change’ and ‘agents of change’ (Schmidt, 2010b, p. 3).

If Schmidt’s DI has provided a framework that seeks to address some of the aforementioned questions on Europeanization, gender equality policy is a particularly interesting field for exploring the institutional, discursive and interactional dimensions of Europeanization processes, and for challenging the idea of Europeanization as a convergence with the EU norm. First, the comparative literature on state feminism and feminist institutionalism has extensively studied the role of gender equality institutions, alongside the women’s movement, in gendering policy outcomes (Stetson and Mazur, 1995; Outshoorn and Kantola, 2007; Sauer, 2010; Krook and Mackay, 2011). Second, gender scholarship has explored how the normative meaning of gender equality is discursively constructed and contested in policy debates (Bacchi, 1999; Ferree *et al.*, 2002; Kantola, 2006; Verloo, 2007; Lombardo *et al.*, 2009). Third, gender literature has highlighted the key role of actors – be they ‘femocrats’, feminist movements, advocacy coalitions or ‘velvet triangles’ of gender policymakers, activists and academics – in the making of policies (Keck and Sikkink, 1998; Liebert, 2003; Woodward, 2003, p. 76; Van der Vleuten, 2007).

Fourth, as gender equality, as a field of EU intervention, has been developed through ‘hard’ (in areas strictly related to the labour market) but especially ‘soft’ policy instruments, it provides a good starting point for exploring the cognitive dimension of Europe’s domestic impact due to the emphasis that these soft instruments place on norm diffusion and social learning (Beveridge and Velluti, 2008). Fifth, gender approaches engaged with the increased diversity of the EU after the Eastern enlargement in terms of institutional, social and political contexts (Krizsan, 2009; Clavero and Galligan, 2009), thus breaking with the *methodological exceptionalism* that often characterized accession studies (Dakowska and Neumayer, 2008)¹. Finally, European gender research has revealed that comparisons across MS show diverse rather than uniform policy outcomes (Liebert, 2003; Verloo, 2007; Lauwers, 2009; Van der Wal and Verloo, 2009). This implies that convergence with the European gender policy norms tends to be taken to the empirical test.

DI and gender policy analyses thus go beyond studies that only focus on convergence in developing frameworks for addressing questions about Europeanization. We will now explore with more detail their theoretical contributions to the understanding of policy change in Europe, identifying similarities and differences between the two scholarships, and focusing more specifically on the added value of discursive–sociological gender approaches.



Discursive–Sociological Approaches to Europeanization

DI in EU studies

EU studies that have developed and applied DI to analyse policy change in Europe, despite their differences, are theoretically indebted to – and have contributed to further develop – new institutionalism (Hall and Taylor, 1996). Some of them place emphasis on institutional paths (historical institutionalism) and the influence that institutional legacies can have on the impact of the EU in a specific domestic context (Cowles *et al.*, 2001). Others focus on actors' dynamics, applying both rational choice's institutionalism to analyse intentional usages of Europe in domestic politics (Jacquot and Woll, 2008; Woll and Jacquot, 2010), and sociological institutionalism to analyse the diffusion of cultural norms and processes of socialization of actors to understand EU domestic impact that see the engagement of actors concerned with policy change (Radaelli, 2000; Sedelmeier, 2006; Saurugger and Mérand, 2010).

DI developed by Schmidt (2002, 2006, 2008, 2010a, b, 2011) and Schmidt and Radaelli (2004) focuses on discourses as key mediating factors for explaining why, how and when political actors internalize EU norms by exchanging ideas and (re) framing their strategic interests within the institutional settings in which they act. Although Schmidt (2010a; 2011) analyses in detail the features and contribution of historical, sociological and rationalist institutionalisms to the understanding of policy developments, she argues that, by neglecting the analysis of discourse and ideas, their capacity to explain the dynamics of institutional change is limited (Schmidt, 2011). This is because – according to Schmidt – the three new institutionalisms have a static approach to institutional analysis 'either because they consider actors' preferences as fixed, or because they understand institutions in terms of self-reinforcing path-dependency and institutional actors as influenced by cultural norms (Schmidt, 2011). The more dynamic approach that Schmidt (2008, 2010a, 2011) attributes to DI by contrast enables – in her view – an understanding of how actors generate and convey ideas in discursive interactions that influence institutions and policies.

Thus, while analytically distinguishing and assessing the features and (often complementary) contributions of the different new institutionalisms (Schmidt, 2010a, 2011), Schmidt's DI goes one step further in tackling the questions insufficiently addressed by convergence-focused Europeanization studies, and therefore in understanding policy change in Europe. As concerns the question of explaining divergent outcomes of Europeanization, Schmidt (2002) takes discourse as a key factor in her account of the different patterns of European capitalism. An example is her 2002 study, which shows that, although the United Kingdom, France and Germany have experienced similar EU pressure towards greater market orientation, policy discourses of political leaders in the three MS have been crucial to generate and legitimize changes towards further economic liberalization that are distinct in each domestic context.



Schmidt's discursive institutionalist framework, being centred on the role of discourse and ideas, also tackles the Europeanization unanswered question of how political actors, through their discourses, frame and use EU norms and in this way generate domestic policy change. In this respect, her framework has the potential to explain policy change with an analysis of endogenous factors such as political discourses rather than just taking change as an – often little explained – exogenous phenomenon (Schmidt, 2010a, 2011).

Finally, Schmidt addresses the question of who are the actors of change by conceptualizing discourse as a dynamic and interactive process (Schmidt, 2006, 2008). Conceiving of discourse as an interactive process, Schmidt (2006, 2008) – also together with Radaelli (2004) – mainly associates discourse with *rhetorical devices* to coordinate ideas among policy actors and to communicate ideas to the general public in order to persuade actors of the convenience of a specific policy change. For Schmidt and Radaelli (2004), discourse is a key mediating factor that helps explain the impact of Europeanization on national policy². Their argument is that significant policy change is most likely to occur when domestic discourse convincingly supports it, as discourse can increase political capacity by influencing actors' preferences and the perception of problems (Schmidt and Radaelli, 2004, p. 186).

Exploring the interactive dimension of discourse also necessitates an analysis of how ideas are used in public debates. The EU is used in national discourses for different aims: to promote policy change by influencing people's perception of an issue, to legitimize specific political actions or discourses and to reinforce one's positioning in the debate. To describe the different ways in which the EU can be used, Woll and Jacquot (2010) (and also Graziano *et al.*, 2011a, b) have elaborated a typology of EU 'usage' ('political', 'strategic', 'cognitive' and 'legitimizing' usages), whose borders are often blurred in political reality, as, for instance, a cognitive usage is usually also strategic and/or legitimizing. In the 'cognitive' type of usage, which focuses on the discursive dimension, policy actors can use the EU by referring to it directly to justify particular policy reforms at the national level, or they might choose to avoid any reference to the EU and instead only frame their communicative discourse in national terms.

DI seems, for the above reasons, the most appropriate for shedding light on the internalization of the 'external' variable by domestic actors and for comprehensively understanding and explaining the complexities of Europeanization processes beyond convergence approaches.

Gender discursive–sociological approaches

Discursive politics

While sharing some of the features of Schmidt's DI, discursive politics approaches to the study of gender equality have placed the emphasis on norms, unintentional



framing and soft policies, as well as on the developing of specific methodologies of frame analysis, which contribute to bring further elements for addressing pending questions of Europeanization.

Discursive politics approaches have flourished within gender studies (Bacchi, 1999, 2009; Ferree *et al.*, 2002; Kantola, 2006; Verloo, 2007; Lombardo *et al.*, 2009), being increasingly applied specifically to analyses of the Europeanization of gender equality policies (Liebert, 2003; Krizsan and Popa, 2012; Lombardo and Forest, 2012). Discursive politics' approaches aim at exploring processes of contestation and attribution of meanings to concepts that take place through the framing of policy discourses. This gender policy scholarship has focused less on discourses as rhetorical devices and more on discourse in relation to its *meaning* and *contestation*. Scholars have discussed the concept of gender equality as one open to continuous contestation during the struggles to achieve a more gender-equal society (Bacchi, 1999; Ferree *et al.*, 2002; Kantola, 2006; Verloo, 2007). Concepts like gender equality are contested in the sense that they have no essential meaning but are rather shaped by political goals and can be discursively challenged. Gender equality acquired different meanings in different places and periods, meaning equal opportunities in some contexts and empowerment in others (Lombardo *et al.*, 2009).

These changes in meaning result from the activities of different policy actors who try to steer the concept's meaning in their intended direction, engaging in different forms of strategic framing that try to adapt to specific political and institutional contexts (Ferree, 2009). Through activities of policy framing, concepts can be stretched to include other realities that were not originally included (such as the extension of gender to other inequalities as in the EU anti-discrimination directives), were shrunk (limiting equality strategies only to the prohibition of discrimination rather than adopting equality promoting measures such as positive actions and gender mainstreaming), or were even bent to other goals than gender equality (as in the strategic framing of gender equality in terms of economic benefits to make it fit EU market-oriented goals) (Lombardo *et al.*, 2009).

Liebert (2003, p. 256), for instance, adopts an interpretative framework that 'emphasises the importance of the meanings that European norms acquire and the varying reactions that Europeanization provokes across different domestic contexts'. By comparing processes of contestation in the transposition of EU gender directives at the domestic levels, she observes which meanings are attributed to EU gender equality policies in the member. Moreover, comparative European gender equality policy research has shown that outcomes of Europeanization are rather diverse across countries (Liebert, 2003; Verloo, 2007; Van der Wal and Verloo, 2009; Lauwers, 2009), thus engaging with the question of divergence of domestic outcomes of Europeanization.

A distinct characteristic of discursive gender policy analyses with respect to the aforementioned discursive approaches in EU studies is the attention to *norms*, in the sense of deeper normative assumptions that are present in political discourses.



These broader hegemonic discourses – in Bacchi’s (2009) terms – set the horizon in which individual frames take place by legitimizing particular subjects or relations as positively normative and others as out of the norm or not as legitimate. Frames can thus reflect normative components present in broader hegemonic discourses – on the supremacy of the labour market, on progressive or traditional gender roles, on heteronormativity or on Europeaness. Normative assumptions expressed through discourses contribute to construct roles and shape rules of conduct for women and men, having consequences on women and men’s life opportunities. For instance, Kuhar’s (2012) discursive study shows that, although the EU has no binding legislation on same-sex partnership rights, domestic advocates and opponents of these rights do frame ideas, norms and values that promote same-sex partnership rights as an EU-driven issue or a matter of ‘Europeaness’, which shapes their respective positions towards EU membership.

Attention to norms within gender discursive politics approaches also means that frames are not only considered as intentional strategic interventions to shape discourses but also as *unintentional*. Sexist, ethnocentric or egalitarian norms might slip into actors’ representation of issues influencing the framing of particular policies in unintended ways – so that, for example, in the presence of a hegemonic discourse that prioritizes the productivity of the labour market, reconciliation of family and work can be framed as aimed at enhancing market productivity rather than greater gender equality. One can distinguish different discursive approaches to Europeanization by their position on the ‘intentionality’ of frames. Schmidt and Radaelli (2004, p. 186) and Woll and Jacquot (2010) treat discourses as intentional, conscious efforts to alter the perception of policy problems and to influence preferences. These approaches, which emphasize national actors’ usage of the EU for different purposes, resemble that of the literature on social movements’ theory (Snow and Benford, 1988), which conceptualizes frames as the actors’ intentional intervention to ‘consciously’ and ‘strategically’ shape reality (McAdam *et al.*, 1996, p. 6).

Frame analyses that draw on the QUING³ research – such as ours – rather suggest that the (un)intentionality of discourses depends on which level of that discourse is examined. The notion of unintentionality has been articulated by Bacchi (2009), who argues that frames have an unintentional dimension that reflects deep cultural and institutional meanings, which makes her question the extent to which policy actors – including policy analysts – can step outside existing hegemonic discourses and intentionally shape frames to strategically achieve their goals. At this macro-level perspective, broader hegemonic discourses influence what frames are available in a certain context and moment, and which individual frames would more successfully resonate with existing hegemonic discourses (Dombos *et al.*, 2009). Yet, looking at frames from the meso- and micro-level perspective, which considers actors’ framing of particular policy issues and documents, ‘actors do make intentional decisions and choose between the available competing frames to pursue their goals’ (Dombos *et al.*, 2009, p. 4). The intentional/unintentional distinction is relevant for analyses of



Europeanization to be aware that the outcome of people's framing actions related to the EU might sometimes be unintentional and reproduce hegemonic discourses on the EU (see Krizsan and Popa, 2012).

Discursive gender policy approaches have developed and applied different methodologies to their object of study. They can draw on cognitive policy analysis, frame analysis, social movements' theory or new institutionalism. The gender approach that we draw on – based on the experience of the QUING research project – focuses on frame analysis methodology. Both for scholars who engage with social movement's theory methodologies and for researchers who adopt frame analysis, the starting point is the concept of policy frame. The literature on social movements' theory (Snow and Benford, 1988) developed the concept to understand social movements' dynamics, while the application of Goffmann's (1974) notion of frame to policy analysis first appeared in Rein and Schön (1993).

In the frame analysis developed in QUING, policy frames include cognitive and normative dimensions, as they are cognitive schemata that help make sense of reality and assess it at the same time (Verloo, 2005). The assumption behind the idea of policy frames is that policy debates construct policy problems in different ways (Bacchi, 1999), which can be studied through frame analysis (Verloo, 2007). This methodology has enabled researchers to make the interpretative and normative content of policy documents more explicit by identifying dimensions such as the diagnosis of the problem, the proposed solutions, the roles assigned to the actors, the gender and intersectional dimensions of texts and the norms involved in the construction of a policy issue (Verloo, 2007). Through the coding of policy documents, frame analysis enables researchers to map different interpretations of what is represented as a problem and a solution in any given policy and identify the normative assumptions underlying the way in which issues are framed. This discursive methodology allows a detailed analysis of how EU policies are framed at the domestic level and what norms do they express. It is then particularly helpful for analysing the content of policies, not so much the process of framing policies.

Adding the sociological dimension to the discursive approach

Discursive gender studies vary in relation to the attention they pay to the process and content of policy frames. Ferree *et al* (2002), in the tradition of social movement theories, use 'discursive' with a dynamic meaning, and analyse both the content and process of framing done by a multiplicity of actors who engage in discursive contestations on meanings. Verloo's (2007) research has focused more on the analysis of the content of policy frames than on the dynamics of processes that accompany the framing of discourses. To clarify the importance of an approach to study Europeanization that pays attention to both content and process of framing, we have decided to employ the term 'discursive' to refer to the content of frames, and to stress more clearly the dynamic element of actors' interactions by adding a



‘sociological’ dimension to our approach. In this respect, sociological means paying attention to actors and their interactions in producing changes, their relations between institutional and civil society actors, advocacy networks and alliances. The gender and politics literature has extensively developed this kind of analysis (among others, Stetson and Mazur, 1995; Keck and Sikkink, 1998), applying them also to the study of Europeanization (Guiraudon, 2000; Woodward, 2003; Einhorn, 2006; Forest, 2006; Regulska and Grabowska, 2008; Saurugger and Mérand, 2010).

Sociological also refers to cultural norms and especially processes of norm diffusion that take place in the context of Europeanization (Schmidt, 2011). The EU influences domestic policies through a variety of mechanisms that contribute to diffuse cultural norms among the MS be it through hard or soft policy instruments (Börzel and Risse, 2000; Beveridge and Velluti, 2008). Finally, related to the former, our reference to ‘sociological’ includes an attention to ‘soft’ policy instruments as rules capable of producing policy change in Europe, an issue that has been especially developed in gender literature and that is inevitable to tackle when studying gender equality policies in the EU, where soft measures have abounded. In this respect, the contribution of gender approaches to Europeanization is particularly relevant. Gender studies in the last decade have focused on the making of EU gender policies through soft instruments such as gender mainstreaming and the Open Method of Coordination (OMC). Soft measures, although extensively used in EU gender equality policies, are often criticized for not producing results in terms of implementation and enforcement (Hoskyns, 1996; Van der Vleuten, 2007). Yet, soft instruments such as the European Employment Strategy (EES) and the OMC have enabled positive changes in gender policies where ‘hard’ law did not succeed (Guiraudon, 2008; Zartaloudis, 2008). Beveridge and Velluti’s (2008) gender analysis of OMC makes clear that the Europeanization of gender equality policy does not exclusively consist of the implementation of the *acquis*, but that it also involves processes of norm diffusion and social learning that make soft policies a complementary ally of ‘hard measures’ (see also Beveridge, 2012). Bruno *et al* (2006) show that soft measures can be powerful instruments to spread EU norms, but warn that these measures can be filled with a variety of meanings, especially in the case of gender mainstreaming, which was ‘subverted’ by the priority agenda of the EES, making it ‘less Europeanized as an instrument for reducing gender inequalities than as a mean for promoting the development of the labour force and its flexibility’ (pp. 519, 531).

The addition of ‘sociological’ to the discursive approach to study Europeanization that we support here thus means attention to actors and their interactions, attention to cultural norms and processes of norm diffusion and a focus on EU soft policies as being capable of producing Europeanized outcomes.

Overall, a discursive–sociological approach that draws on the experience of gender and politics studies can contribute to improve the understanding of policy change in Europe by addressing Europeanization questions on the agenda that have to do with divergent outcomes, multiple framings of the meaning of EU discourses, including



their normativity, use and contestation, considering the role of actors and their interactions, and taking into account both hard and soft EU measures that can influence domestic developments.

An empirical case of discursive–sociological approach to Europeanization

The added value of discursive–sociological analyses applied to the Europeanization of gender equality policies for understanding Europeanization and its pending questions will become more clear through an example of how a discursive–sociological approach can be applied to the Europeanization of issues – such as equality policies – that cannot be as convincingly explained by other approaches – such as those focused on convergence. The approach we suggest is part of the family of discursive approaches such as Schmidt’s, but thanks to the proposals coming from gender approaches that we have discussed in the former section, it can complement and further develop DI.

Krizsan and Popa (2012) apply a discursive–sociological approach to the analysis of the Europeanization of domestic violence policies in five Central and Eastern European countries (CEEC) in the pre-accession period. They analyse a policy issue – such as domestic violence policy – that is not a core EU competence and thus was not originally part of the regular conditionality criteria for accession. Yet, even for an issue that was not part of the core criteria of EU accession and on which there were EU soft but not hard measures, the use of a discursive–sociological approach – that is, attentive to framing, policy learning and actors’ dynamics – enables researchers not only to find evidence of Europeanization but also to enhance the researchers’ grasp of Europeanization mechanisms.

Krizsan and Popa (2012, pp. 68–69) find that the EU influences domestic violence policies – in Romania, Croatia and Poland more than in Bulgaria and Hungary – through three mechanisms: first, the widening of the regular conditionality criteria to include domestic violence, that occurred when women’s and human rights advocates in individual negotiations with the European Commission framed their domestic violence claims by relating them to some of the main conditionality criteria; second, EU financial incentives through the Daphne programme, which funded NGO projects against domestic violence, supported social learning and capacity building to develop policies against domestic violence, and diffused EU norms against violence through transnational networking; and third, strategic framing of domestic violence issues by women’s advocates in Romania and Hungary, who, by interpreting the importance attributed in the pre-accession period to a widely accepted norm of ‘Europeanness’ associated to progress, which citizens aspired to, were able to frame domestic violence laws and policies in a way that made them resonate with the dominant frame of ‘Europeanness’ and thus achieved successful outcome in parliamentary debates.

The added value of a discursive–sociological approach as exemplified in Krizsan and Popa’s (2012) study is their broader explanatory potential for understanding



policy change in Europe and for addressing pending Europeanization questions. By adopting a discursive–sociological approach, Krizsan and Popa are able to explain divergent policy outcomes of Europeanization – that is, why some CEECs manage to Europeanize their domestic violence policies and others do not – by recurring to the analysis of women’s advocates’ strategic framing of the issue. Indeed, by detecting women’s advocates’ discursive strategic usage of the EU that linked domestic violence policies to the mainstream desired norm of ‘Europeanness’, Krizsan and Popa (2012) show how a bill on domestic violence can be successfully presented in a Parliamentary debate in Romania as ‘one of the most European laws debated in our Parliament’ (p. 66) on an issue such as violence against women on which the EU – until 2011 – had no binding legislation at all.

This framing action shows that the meaning of what is included in the *acquis* as hard measures, when analysed discursively, is open to contestation and can be shaped by political goals. Similarly, by analysing actors’ dynamics, authors explain how domestic policy actors manage to negotiate with the Commission the conditionality criteria during the accession process even in a soft policy field such as domestic violence that was not originally part of the EU accession criteria. Finally, they show that the EU can indeed influence countries even through soft measures such as the Daphne programme that favour social learning for change.

Conclusions

From a formerly dominant focus on MS’ convergence around EU norms, Europeanization theory has recently developed a broader theoretical–methodological focus that endorses more sociological and discourse-centred understandings of the ‘domestic impact of Europe’ (see Schmidt, 2002, 2006, 2008, 2010a, 2011; Börzel and Risse, 2003; Radaelli, 2004; Schmidt and Radaelli, 2004; Woll and Jacquot, 2010). This approach to Europeanization aims to gain a better understanding of policy change through studying the framing and diffusion of norms, and actors’ interactions.

Both DI theorized by Schmidt and gender policy analyses with a discursive–sociological perspective show that convergence approaches to the study of Europeanization reveal limitations in their capacity to understand why and how policy change occurs in Europe. DI and discursive gender analyses engage with pending questions concerning Europeanization such as divergence of domestic policy outcomes, multiple policy framings of the EU, influence of soft policy instruments and role of actors in producing policy change. Schmidt’s DI has contributed to place discourse at the forefront of Europeanization research and has constructed a theoretical framework apt to explain why and how policies are Europeanized through the analysis of how agency and changes are ‘endogenized’. Gender approaches complement and enrich the explanatory potential of DI thanks to their experience in



discursive methodologies and attention to dynamics between institutional and civil society actors, their focus on meaning and contestation of discourses, their emphasis on normative assumptions that are present in EU discourses and interact with domestic systems of norms and values and their study of how EU soft measures influence domestic policies. The analytical framework for studying Europeanization that we endorse here is discursive but also sociological, in the sense that it includes an analysis of actors' dynamics, processes of norm diffusion and EU soft policy measures.

Overall discursive–sociological perspectives have a broader explanatory potential that can help understanding policy change even during hard times for Europe, when political and economic crises shake the foundations of European integration. Approaches mainly focused on policy implementation and compliance often stem from the same strong neo-functionalist premises that convergence is the rule and that the EU's construction is historically oriented towards greater legal integration. For this reason, they are less suited to times of crisis, when domestic political rationales are prioritized and resistance to Europeanization abounds. In such a context, broader analytical frameworks such as the discursive–sociological ones can help understanding policy change in general, taking into account not only conditionality effects but also actors' discursive usage of the EU, and soft mechanisms of policy learning.

The fruitfulness of a dialogue between the European integration and the gender policy scholars moves us to advocate strengthening the relationship between the Europeanization and the gender policy scholarships. Jointly they can contribute to the sociological-discursive approaches to Europeanization that, we argue, have a great potential to grasp the complexities of Europeanization processes. Findings from comparative analyses of gender equality policies (Liebert, 2003; Krizsan, 2009; Graziano *et al*, 2011a; Krizsan and Popa, 2012; Lombardo and Forest, 2012) that also consider soft measures through discursive methodologies have shed light on the highly differentiated impact of Europe according to policy areas, political cleavages or mobilized actors. The picture of Europeanization that these studies offer is perhaps more complicated to interpret and less easily encapsulated in general models, but it is also probably closer to empirical reality.

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Notes

- 1 These studies are based on the idea that the Eastern enlargement is a special phenomenon that deserves to be tackled separately from other Europeanization processes and studied using a specific research agenda that emphasizes conditionality.
- 2 The other relevant factors are policy problems that demand change, political institutional capacity, policy legacies and policy preferences.
- 3 The European QUING project (Quality in Gender Equality Policies, 6th Framework Programme EC, 2006–2011) analysed gender and other equality policies in the 27 MS and 2 candidate countries, see www.quing.eu.

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