

# From Enforcement to Resistance: Institutional Guidelines on Gender-Inclusive Language in Comparative Perspective

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# Context: Role of Institutions

**Institutions have become central actors in debates on gender-inclusive language.**

- By issuing guidelines, drafting statutes and producing advisory documents, they:
  - ◆ regulate language use
  - ◆ reflect prevailing political and social conditions
- Their interventions range from:
  - ◆ progressive enforcement
  - ◆ to explicit resistance

- The uptake of linguistic innovations is shaped by:
  - ◆ **cultural traditions**
  - ◆ **institutional authority**
  - ◆ public controversy

# Corpus

Focus of the study:

**How institutional guidelines promote, constrain or contest gender-inclusive language.**

- **Study:** based on a multilingual corpus of 100+ institutional guidelines.
- **Material:** includes documents issued by institutions in different languages and contexts.
- **Guidelines classification:** functional and institutional types.
- **Guidelines grouping:**
  - ◆ Legislative
  - ◆ Administrative
  - ◆ Advisory
  - ◆ Academic

- This classification allows us to distinguish between documents that differ in institutional role and authority.
- The corpus spans more languages, in this research we focus on **4**:
  - ◆ Polish
  - ◆ Serbian
  - ◆ Italian
  - ◆ Spanish
- **Rationale for selection:** diverse
  - ◆ grammatical structures
  - ◆ policy traditions

# Scope and aims

- The analysis considers:
  - ◆ prescribed forms
  - ◆ the rationales offered
  - ◆ the degree of institutional force attached to them.

- The aim is to identify:
  - ◆ where guidelines promote change
  - ◆ where they constrain it
  - ◆ where they are actively contested.

# Background

	Polish	Serbian	Italian	Spanish
language family	Slavic	Slavic	Romance	Romance
sociopolitical context	interest in feminist reforms since 1980s; institutional visibility of equality policy under the <b>centrist</b> government in 2023	EU accession-oriented but essentially <b>right-wing</b> government since 2012	growing interest in feminist reforms since 1980s; <b>right-wing</b> government since 2022	open to feminist reforms since 1980s; progressive, <b>left-wing</b> government since 2018
legal framing	constitution; national laws on gender equality - but no legal framing of gender-fair language	national laws on gender equality	national laws on gender equality	constitution, national laws on gender equality
institutions	Government/equality bodies, ombudsman, local governments, academia, NGOs	government, OEBS, NGOs, ombudsman, commissioner for the protection of gender equality	governmental agencies, local government, academia	Parliament, ministry of equality, local governments, academia, NGOs, etc.

# Polish: background information

- complex morphology (variety of inflectional forms);
- complex syntax (conjugation, concordance rules)
- generic masculine;
- In Polish, the grammatical gender of a personal noun affects all syntactically dependent elements, including adjectives, possessive forms, and past or conditional verb forms.
  - ◆ Feminine grammatical gender usually refers to a woman or a group of women.
  - ◆ **Masculine grammatical gender is often treated as a generic** form and may refer to both men and women (Łaziński, 2006).
  - ◆ Feminine personal nouns in Polish, especially for professions and positions traditionally associated with men, are usually derived from masculine forms by suffixation (Grochowska & Wierzbicka, 2015).
  - ◆ The most common suffixes used to form feminine nouns are:
    - *-ka*: dyrektor → dyrektorka
    - *-yni / -ini*: naukowiec → naukowczyni



# Polish: background information

- In Poland, the derivation of feminine personal nouns from the so-called generic masculine has been debated since at least the early 20th century (Woźniak, 2014).
- As a result, grammatical gender, gender in language, and gender-sensitive Polish have been extensively studied. This research has covered:
  - general linguistic aspects
  - institutional discourse
  - parliamentary discourse
  - legal contexts

Despite strong scholarly interest and the social relevance of the issue, **Poland has still not developed official state recommendations on gender-neutral or gender-fair language.**



# Polish: state resistance background

This gap in state-issued guidelines on gender-neutral or gender-fair language is partly compensated for by:

- EU recommendations for Polish
- guidelines issued by universities
- guidelines issued by NGOs
- recommendations from local authorities
- the Polish Language Council's relatively positive stance on feminine nouns in 2019.

These documents usually recommend the following:

- **feminization**
- **splitting forms**
- **collective or gender-neutral expressions**

Such strategies are recommended especially in less formal contexts.

At the same time, **social resistance persists**, particularly in formal and institutional settings.

Law can act as a barrier – feminine forms are not recognised in legal documents, creating issues in official contexts.

At the same time, recent requirement discouraging the generic masculine in job ads has sparked debate.



# Polish:

## Resistance case study: high-ranking positions

- ◆ Debate remains especially strong around **the feminization of prestigious functions and job titles.**
- ◆ The formation of feminine nouns for **high-ranking positions and titles is considered to be constrained mainly by extralinguistic rather than linguistic factors** (Szpyra-Kozłowska, 2019).
- ◆ Although Polish allows the derivation of feminine forms for personal nouns in principle, masculine forms are still often used for women in prestigious roles.
- ◆ This tendency is visible in both written and spoken Polish, for example in titles such as *marszałek* [marshall] or *minister*.
  
- ◆ In such cases, female gender is often marked in other ways:
  - by adding *pani* before the noun
  - by using feminine grammatical agreement in adjectives, verbs, and other dependent elements.



# Serbian: background information

- complex morphology (variety of inflectional forms, declinations);
- complex syntax (conjugation, concordance rules)
  
- **generic masculine (Ćorić, 2008):**
  
- background on feminine forms:
  - ◆ occurring since the 11th century, predominantly synthetic (e.g. *kaluđerica* [nun], *kneginja* [f. duke]);
  - ◆ their number has risen over time, esp. since the late 1970s (e.g. *predsednica* [f. president]), *premijerka* [f. prime minister];)
  - ◆ 12 feminine suffixes: most productive are *-ica*, *-ka*, *-(k)inja*
  - ◆ analytical forms also possible but rare: e.g. *žena pilot* [f. pilot], *žena advokat* [f. lawyer]
  
- conservative cultural roles, mysogyny, sexism
- the discussion about feminine forms going on for over 40 years now
- guidelines funded by NGOs, OEBS, the government but **no state-issued guidelines**



# Serbian: general trends

- **Feminatives** for professions, jobs, titles
- **Parallel forms** for men and women in job vacancies, text(book)s (e.g. *konduker/kondukerka, konduker-ka, konduker ili kondukerka*)
- **splitting** when addressing (e.g. *građani i građanke* [male and female citizens])
- avoidance of terms such as *gospodica* [Miss] that imply marital status
- avoidance of stereotypical roles in textbooks (e.g. a man is a doctor, a woman is a housewife)
- use of gender-neutral *osoba* [person] instead of victim, invalid, etc. (e.g. *osoba koja trpi nasilje, osoba sa invaliditetom*)
- the subject and predicate must agree in gender and number (e.g. *Profesor**ka** doktor**ka** je, gostujući u emisiji, govoril**a** o rezultatima*)



Br	Forma ženskog roda 1	Forma muškog roda	Forma ženskog roda 2
A	advokatica	advokat	advokatkinja
	akademkinja	akademik	
	aktivistkinja	aktivista	
	ambasadorka	ambasador	
	antifašistkinja	antifašista	
	arheološkinja	arheolog	arheologinja
	asistentkinja	asistent	

# Serbian: backlash

- first law on gender equality: 2009
- second law on gender equality: 2021, was to have been implemented from May 2024 but withdrawn in June 2024

- backlash generated by:
  - ◆ **scholars majoring in Serbian**
  - ◆ **the Committee for the Standardization of Serbian**
  - ◆ Matica Srpska
  - ◆ **the dignitaries of the Serbian Orthodox Church**, including the head, Porfirije
  - ◆ right-wing political parties

- Backlash:
  - ◆ **language engineering**
  - ◆ artificial feminization of language
  - ◆ introduction of **woke culture** (and genderization)
  - ◆ anti-constitutional law, a **violation of the right to** free thinking and **free speech** (since the use of feminatives is mandatory)
  - ◆ destruction of the lexico-semantic structure of Serbian and its conceptual system
  - ◆ transformation of the society
  - ◆ language as a cultural legacy threatened

# Serbian: resistance

→ **generic masculine forms inclusive, not discriminatory**

→ **splitting unnecessary and discriminatory**

*Poštovane građanke i građani...*[Esteemed female citizens and male citizens]

implies female citizens are esteemed whereas male citizens are not

→ **parallel forms in text(book)s cumbersome (due to congruence)**

*Učenice i učenici su došli i došle*

*[Male students and female students have come]*

→ **some feminine forms would be hard to differentiate, meaning-wise, from existing words**

e.g. <i>trenerka</i> [f. coach]	<i>govornica</i> [f. speaker]	<i>poslanica</i> [f. MP]
<i>trenerka</i> [tracksuit]	<i>govornica</i> [lectern]	<i>poslanica</i> [epistle]

→ **some feminine forms would be hard to pronounce**

e.g. *arhitektinja* [f. architect]



# Italian: background information

- binary grammatical gender system (both in syntax and in morphology)
- generic masculine
- interest in the feminine forms starting from Alma Sabatini's recommendations: *Raccomandazioni per un uso non sessista della lingua italiana* (1986). They were perceived with skepticism.
- Interestingly, most of the analysed guidelines are created by local governments and individual institutions, **none is state-issued**.
- Direttiva 23 maggio 2007 *Misure per attuare parità e pari opportunità tra uomini e donne nelle amministrazioni* - public administrations need to use a non discriminatory language.
- *Strategia nazionale per la Parità di genere 2021-2026* promotes feminine forms and inclusive language.



# Italian: general trends

Administrative guidelines on inclusive language seek to address the Italian language in two possible ways:

## 1. Visibility:

- Splitting, avoided when possible
- Proximity rule
- Use of slash (/) is accepted. In short texts, it's recommended; in longer ones, it's preferred not to be there.

## 2. Obscurancy:

- Passive form
- Impersonal form
- Collective nouns ("comunità studentesca", "personale docente", "individuo", "persona") and epicene words
- Re-writing and paraphrasing

Accordance on the rejection of neologisms and forms created with the morpheme **-u**, graphic signs **-\*** and **-@**, and the phoneme **schwa**.

University and museum guidelines are more likely to accept neologisms under certain circumstances. There is also a tendency to use epicene words and collective names to avoid the masculine generic form.

# Resistance: politics

The right-wing **politicians** believe that the inclusive language is not a priority, they believe that equal rights do not come from language innovations.

In fact, (the first female) Prime Minister Giorgia Meloni had decided that she had to be addressed to as *il presidente del Consiglio dei Ministri* and not *la presidente*: "I think there are **more concrete matters** that need to be tackled and for which we need to fight. It is a matter of **priorities**".

**However**, in 2013 the **Accademia della Crusca**, the institution that has been working on recommendations on the use of the language, declared that the feminine form of jobs titles had to be used when referring to people identifying themselves as women.

In cases of epicene words - as the word *presidente* - the grammatical gender would have been defined by the article preceding the lexical unit.

This is, of course, not the only case, when inclusive language is not chosen by right-wing politicians and known personalities.

# Resistance: Accademia della Crusca

The **Accademia della Crusca** is a fundamental institution for the Italian language, however it does not have a normative role. The linguists describe the language and can influence public debate, due to its scientific role. The Accademia recommends different strategies for an inclusive language; some are different from the ones of the analysed guidelines:

- Neologisms are hardly accepted,
- All forms created with typographical marks (i.e. ə ʒ \*) must be avoided.
- Use **feminine forms** in job titles, when possible. Otherwise, adapt the article in cases of epicene words.
- **Splitting forms should be avoided**; it is better to use a collective correspondent.
- It cherishes the so-called **masculine-inclusive plural** form as the only proper form:
  - a. the *overstretched feminine* form excludes the masculine and does not allow the feminine to be fully visible;
  - b. the masculine form is historically and traditionally more known

The reasons given are the following:

- The economy of the language,
- "Real" inclusiveness

# Spanish

- grammatical gender: nouns, adjectives, pronouns, past participles, determiners;
- generic masculine;
- morphology & syntax simpler than in Slavic languages, far more complex than in English (conjugation, concordance, gendered determiners, etc.);
- gender-inclusive language: mostly feminization: morpheme **-a** (*presidente* - *presidenta*) or article change (**el** miembro -> **la** miembro; rare);
- rise of (new) feminine forms since the 1980s;
- late 1990s-early 2000s: guidelines for specialized languages (i.a. legal, administrative, academic);
- gender-sensitive language widely studied in Spain at least since 1980s (i.a. **Mercedes Bengoechea Bartolomé**)



# Spanish: non-sexist language use guidelines: general trends

- **main goal: avoiding generic masculine**
- **feminization** when referring to women; **neutralization** when referring to unspecified individuals;
- splitting (*profesores y profesoras*);
- gender pairs (*el/la solicitante*);
- collective nouns (*alumnado, equipo docente, ciudadanía*);
- impersonal grammatical constructions (*se propondrán soluciones*);
- neutral pronouns (*quien* instead of *el que/la que*)
- gender-neutral word choices where possible (i.a. *diferente* instead of *distinto/a*);
- **rejection of gender-neutral neomorphemes (-x, -@) and neologisms.**

# Resistance: Royal Spanish Academy

- official royal institution tasked with language monitoring & planning; issuing “correct usage” recommendations & manuals;
- **early 2000s**: three levels of resistance to gender-inclusive forms (Bengochea, 2009):
  - a) slow inclusion of feminine forms in the dictionary;
  - b) insisting that *hombre/hombres* (man/men) is inclusive in its meaning as ‘human’;
  - c) rejecting splitting;

## cancillera

Artículo

De *calce*<sup>2</sup>.

1. *f. Sal.* Cuneta o canal de desagüe en las lindes de las tierras labrantías.

## hombre

Artículo

Del lat. *homo*, *-inis*.

Sinónimos o afines

1. *m.* Ser animado racional, varón o mujer. *El hombre prehistórico.*

SIN.: humano, individuo, mortal, sujeto, persona, ser<sup>2</sup>.

# Resistance continues: Royal Spanish Academy

→ **2018: *Libro de estilo de la lengua española según la norma panhispánica***

→ **2020: report on inclusive language in the Spanish constitution (156 pp.)**

— “**inclusive language**” may mean either adding feminine forms OR using so-called “**inclusive masculine**”, that is the masculine grammatical gender referring to all people;

— the RAE considers Spanish (including the Constitution) inclusive because it relies on “inclusive masculine” across all grammatical categories;

— the RAE argues that the generic (“inclusive”) masculine supports economy, stylistic variety, and flexibility, and rejects claims that it is inherently patriarchal (only discourse can be sexist !!!); proposed non-sexist alternatives are criticized as potentially unclear, repetitive, or limiting (2020: 48-61);

→ **2024: statement on parliamentary non-sexist language guidelines:**

— commends lack of neologisms & neomorphems (-@/-x/-e), limited splitting, and using only forms included in the dictionary;

— explicitly rejects the need to replace the so-called “inclusive masculine”;

— critiques the notion of “non-sexist language”, questioning its coherence and sincerity;

— argues that gender equality cannot be achieved via artificially modifying Spanish grammar or vocabulary.

# Guidelines: comparison

	Polish	Serbian	Italian	Spanish
<b>Legislative/policy context</b>	EU gender equality strategies, mainly internal and local institutional equality/diversity policies	law on gender equality, gender equality strategy 2021-2030	laws on gender equality, EU gender equality strategies; local and institutional equality plans	EU gender equality strategies; constitution; national equality laws; local and institutional equality plans
<b>Documents scope &amp; classifications</b>	ranging from EU-level, institutional level	national level	EU-level, national and local level	ranging from EU-level to institutional level
<b>Linguistic innovations</b>	considerable — es. feminatives, doubled, neutral alternatives, and inclusive forms	considerable - mostly feminatives	minimal	minimal
<b>Intersectionality</b>	limited but present; mostly gender-focused, with occasional references to other grounds of discrimination	limited: mentions stereotype and its role in textbooks	very limited: only one referring to ageism, more texts mention stereotype	limited; mentions stereotype, but not openly intersectional
<b>Trans identities</b>	present but uneven	absent	limited	absent

## Resistance: comparison

	Factors
Polish	Diffused resistance rooted in <b>conservative social norms, right-wing politicians</b>
Serbian	<b>Normative resistance</b> by the official institution in charge of standardization, Serbian majors and PhDs, clergy, right-wing politicians
Italian	The biggest resistance comes from the right-wing <b>politicians</b> ; a limited form of resistance comes from the <b>institution that describes the language</b> and has a prescriptive role
Spanish	<b>Normative</b> resistance by the official language planning institution

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