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Gender as a Category of Historical Analysis: the Methodology of Gender History

At the present stage of the development of historical science, gender history is becoming one of the most promising areas of research, opening up new methodological possibilities for historical analysis and focusing attention on understudied issues concerning the role of women in history. This article is devoted to identifying the main methodological principles of gender history aimed at analyzing the sociocultural context. In this case, the gender approach is defined by an analysis of a set of symbols and images that have formed in culture and are associated with the definition of historically established “gender norms” that have developed in the field of history. Gender analysis also encompasses gender-differentiated social institutions that determine a person’s position in society (education system, political system, family, labor market). This approach makes it possible to create a comprehensive picture of women’s participation in a particular sphere of activity during a specific historical period. The article examines the emergence and development of gender studies in the context of the formation of feminist theories, their integration into the academic sphere, and the application of gender studies methodology in various fields of humanities. The authors analyze the application of the gender approach in the study of history, as well as the prospects for the category of gender in historical and interdisciplinary research. The authors highlight the emergence and formation of gender history, its methodological apparatus, and reveal the possibilities and prospects for the application of gender historical methodology.

Keywords: gender, gender history, gender relations, gender studies, gender hierarchy, gender history methodology.

Introduction

In contemporary humanities, there is a tendency to move away from traditional narrative research methods, with new forms and directions of scientific research emerging. One such direction is gender history, a rapidly developing field that has gained status as an independent historical subdiscipline. Gender studies have now acquired their own special discourse and vocabulary, their own specific subject matter, and have become widely developed in contemporary Kazakhstani historical science, finding points of convergence with the developing history of everyday life.

At the beginning of the 21st century, gender history is one of the most dynamically developing branches of historical knowledge in Western countries, gradually becoming mainstream in other geographical and cultural regions, including the post-Soviet space. According to data from the American Historical Association for 1975–2005, the number of American historians specializing in women’s and gender history increased more than eightfold, and the bibliography on women’s and gender history in English alone is extensive that it is impossible to create a comprehensive database of it today. The development of new fields within historical knowledge reflects, on the one hand, general processes in the humanities in the second half of the 20th and early 21st centuries and, on the other hand, the specifics of historical science associated with the interpretation of concepts proposed by gender studies scholars [1].

Women’s and gender studies in historical sciences focus on the problem of the social construction of gender differences, the interconnection and influence of these processes on the overall picture of the historical development of humanity.

At present, it can be said that a gender studies community has formed within contemporary Kazakhstani historical science. Many universities in the republic have introduced courses on gender. The scope of gender studies in Kazakhstan is broad. Gender has become a subject of research in sociology, philosophy, political science, psychology, pedagogy, philology, and history. The aim of gender studies has been gaining, and it still has more to gain in understanding the social role of women in history and the modern world and in assess their contribution to humanity’s achievement.

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In this regard, we believe that contemporary Kazakhstan historical science needs to engage more actively in gender studies. Accordingly, a concept of gender education should be developed that will define the precise place of gender studies in the knowledge system, taking into account their genuine theoretical and practical significance for transitional societies such as the countries of the Eurasian Economic Community.

Materials and methods

The main sources for this article are theoretical works by foreign researchers, particularly J. Scott, L.P. Repina, and I.V. Pushkareva. The scientific article by the American historian of France, J. Scott, which made a significant contribution to gender history, "Gender: A Useful Category of Historical Analysis", is one of the most widely read and cited articles and was the basis for the formation of the field of gender history within the Anglo-American profession. Joan Scott's theoretical views on gender define it as "the primary mode of defining power relations" and "a useful category of historical analysis". L. Repina's theoretical views on gender are linked to her critical approach to contemporary gender theory, which she sees as a tool rather than an objective scientific study aimed at understanding female nature rather than both sexes. Repina presumably criticizes gender studies for focusing only on the female aspect, ignoring the need to study both male and female genders equally. N.L. Pushkareva is the founder of gender studies in Russian historical science. This scholar is credited with analyzing the relationship between the sexes, as well as the sociocultural factors that have influenced the position of women in Russia over the course of ten centuries.

Traditional approaches and methods used in humanities research are employed to analyze scientific works devoted to gender history studies: a systematic approach, analytical study of materials, a historical-chronological method, comparative-historical analysis, and a descriptive approach.

Results

The gender approach was developed within the framework of a new branch of scientific knowledge—women's studies, which emerged as a result of the revival of feminism in the 1960s. This explains the close connection between women's studies and feminist theory that remains to this day: issues that were important to the women's liberation movement became the subject of academic research in universities and other academic institutions. For example, owing to feminists, historians in the 1970s paid considerable attention to the concept of patriarchy, tracing its development in societies of the past. The starting point in this context was an article by American researcher Barbara Walter, which introduced the concept of the cult of 'true femininity' as the basis of the patriarchal system of American (and European) society in the 19th century [2]. It was activists from the women's liberation movement, working in American universities and striving to give feminist consciousness a theoretical foundation, who became the pioneers of a new discipline: Women's Studies. The realisation that the object of study had previously been exclusively male experience also occurred in historical science, where feminists formulated the idea of the need to write 'herstory'—the history of women [3].

Feminism (from Latin *femina* — woman), in a broad sense — "a term applied to ideological-political, legal, and philosophical currents of Western thought concerned with women's issues" [4; 171]. On closer examination, it is worth noting some of the definitions of feminism presented by N.L. Pushkareva in her article "What is Feminism?": a social movement aimed at achieving equal rights and opportunities for women and opposing a social structure in which discrimination and oppression based on gender is possible; a research methodology that involves the inclusion of women's social experience, women's view of the world, and the articulation of women's value systems [5; 404].

Of particular importance was the promotion of women's studies in academia, the formation of a new separate discipline that would fully cover women's issues and be responsible for the scientific examination of the "women's question". Thus, the task of "women's studies" in relation to traditional sciences is not so much to supplement or correct them with regard to women's experience, but rather to place such studies on a par with independent academic disciplines. It is in this capacity that "women's studies" are able to question and challenge established methodology, providing "a fresh and holistic view of the world through interdisciplinary methodology" [6; 23]. During its development since the early 1980s, women's studies has been institutionalized and received support from public and private foundations. Research institutes were opened, some of which formed separate departments at universities. They published their own books and journals devoted to women's issues, raising the discussion of gender issues and discrimination in both the public and private spheres to a new level. During this same period, the first anthologies and textbooks on "women's studies" were published.

In the mid-1980s, gender studies entered a new phase. Researchers paid great attention to including the experiences of women from various social and ethnic groups, women of color, and homosexual women. This can be justified by the fact that “women’s studies”, in addition to the generalized experience of “all women”, needed to consider the internal diversity of this experience. Representatives of various minorities critically noted that, along with gender discrimination, there are more specific reasons for the marginalization of women: religion, ethnicity, sexual orientation, age, and social status [7; 39].

The most important step in the birth of gender history is traditionally considered to be the article by American historian Joan Wallach Scott, “Gender as a Useful Category of Historical Analysis”, published in 1986.

Starting out as a typical feminist historian studying social movements in 19th-century France, with a broad research vision and scientific courage, Scott proposed putting an end to the opposition between “male” and “female” history. She addressed her appeal to the most respected representatives of her professional guild, delivering a speech at the American Historical Association meeting in December 1985. She spoke about the debates surrounding historicism and empiricism, about the transition from a content- and event-based approach to covering the past to a textual and interpretive one, and reflected on the future of science, which must find grounds for uniting “eventfulness” and “textuality”. She proposed “gender history” as the meeting point.

Having established the need to overcome the ahistoricity of dominant interpretations of gender in history, J. Scott proposed a productive framework for analyzing historical material through the prism of a new concept and four groups of socio-historical subsystems or areas of study:

1. A set of symbols and images characterizing men and women in culture (gender stereotypes) that existed at different times, typical and ideal images, including those that became patterns and models (Adam, Eve, Mary), mythological ideas about vice, defilement, or purity, forms of their representation and transformation in different historical contexts and many similar plots.

2. A set of norms—religious, pedagogical, scientific, legal, political (gender norms)—which involved working with established cultural norms. In the process of competing alternative concepts enshrined in different doctrines, did they contribute to the development of the concept of what was “right” or even “the only possible” in relation to men and women?

3. When analyzing the complex issues of self-expression, subjective self-perception, and self-awareness (gender identity), it was necessary to consider the peculiarities of self-identification of men and women in different eras. Close attention was paid to the peculiarities of so-called “gender conflicts”, when subjective gender identity might not coincide with culturally prescribed and socially determined images.

4. The last set of patterns included an analysis of the role of gender differences in the functioning of social institutions that participate in the formation of gender (these are the family, kinship system, household, labor market, education system, state structure, etc.) [8].

By the end of the 1990s, women’s studies had reached the global stage, contributing to the dissemination and exchange of information and experience through conferences, congresses, and the activities of various women’s organizations. The number of publications increased, now appearing not only in Europe and the United States, but also in postcolonial states and Third World countries [5; 161]. Parallel to the development of women’s studies in the scientific research environment, the concept of “gender” (English “gender”) has become widely used. Previously, it was used in its literal lexical meaning, but in 1955, according to N.L. Pushkareva, was first introduced by sexologist John Money specifically to “distinguish between general gender characteristics and sexual-genital, sexual-erotic, and sexual-procreative qualities”. Robert Stoller specified the concept by applying the term to denote “gender in a social context,” thus separating the concepts of ‘sex’ and “gender” as defining biological sex and social gender, respectively [9; 9].

Taking into account all the characteristics, N.L. Pushkareva gives the following definition of gender: “Gender is a system of interpersonal relations that forms the basis of social stratification based on sex. Gender as a system of interpersonal relations implies the constant endowment of power and opportunities for domination of some subjects (usually men) and the subordination of others (women, so-called sexual minorities, etc.)” [5; 161].

With the development of gender studies and the inclusion of gender as a category in the social sciences, their problem area expanded significantly, and a new methodology was formed which took gender into account as a fundamental category of cultural-historical, economic, and socio-political analysis. Along with the realization of the absence of women’s names in certain spheres of human activity, such as art, politics, and science, came a comprehensive understanding of their almost complete absence in history in general. Thus,

in the second half of the 20th century, gender and women's studies gave rise to the need, as Joan Kelly put it, for "a revival of history for women and women for history". Initially, "women's history" was intended for these purposes, but subsequently, the object of research was reinterpreted in favor of the idea that the concept of "gender" introduces a degree of relativity into the perception of both female and male, which, in general, reflects its sociocultural nature. It is assumed that "gender" is more neutral and objective in the study not of women in isolation, but, at a minimum, of women in interaction with both men and historical contexts.

J. Kelly, a researcher of women's history, draws on themes in her work that she uses to evaluate the history of the Italian Renaissance to understand and define the role and place of women in that era. She proposes analyzing:

- The degree of control over female sexuality compared to male sexuality (this is accompanied by perceptions of female physicality, the definition of acceptable norms of behavior in society, including sexual behavior, regulated by society and religion);

- The economic and political situation of women in order to determine what position women occupied in society in terms of their work, degree of financial independence and private property rights, and participation in political life and professional activities; the cultural roles of women, determined by access to education;

- The ideological context of women's lives, the system of symbols directed at them, which shapes the gender role system through art, literature, and philosophy [10; 163].

All these themes define the purpose of gender history—to identify the sociocultural context in which certain gender relations are formed, in which men and women occupy different social positions. As in other areas where the gender approach is applied, defining the role of women in history and demonstrating that women do indeed have their own history, distinct from that of men, is only the first step. It is important to identify the processes and conditions that answer the question of how certain hierarchical positions developed and how the history we knew before was perceived by us as universal [5; 195].

The absence of women in history was justified by the fact that, for a long time, spheres of activity were defined as "female" — "private" and 'male' — "public". As L.A. Repina writes: "At the same time, gender historians, relying largely on anthropological studies that link the dominant position of men and gender inequality directly to the functional division of human activity into private (domestic) and public spheres and the exclusion of women from the latter, they made their own corrections to this scheme. For example, in many works, the issue of the so-called autonomization of the private sphere takes a back seat. The starting point is an understanding of the dependence and even the possibility of the functioning of the public sphere, which was almost entirely dominated by men, on the creative activities of women in their private domestic lives. The family becomes the focus of research not only because it is where the interaction between the sexes takes place, but also because it is the place where the private and public spheres of life intersect and influence each other, the place where reproductive and all other forms of human activity are coordinated and mutually regulated" [11; 213].

The gender approach to analyzing the past involves new forms of research, as well as the active use of methods from various humanities and natural sciences disciplines. As a rule, most gender scholars do not reject the method of historical analysis, do not deny the principles of historicism, and recognize the exceptional importance of the comparative method. Ethnological, sociological, and psychological methods are popular. According to N.L. Pushkareva, gender studies in the fields of cultural studies, the history of mentalities, and public consciousness are the most promising [5].

In recent years, new methods and interdisciplinary approaches have been used in the study of regional history. Gender studies have brought attention to the issue of women's participation in modernization processes in the 1920s and 1930s, in World War II, and elsewhere. The period under consideration was characterized by a fundamental feature in the formation of gender relations. It was not an evolutionary, gradual restructuring, but a simultaneous change in social orientations, a revolutionary break with public consciousness. Research is conducted within the framework of social history, from the perspective of which women are viewed as a special social group with their own specific needs and interests. The method of analysis is a gender approach, which involves the examination of socio-historical phenomena taking into account the factor of gender, which is not simply a reflection of biological characteristics, but also the result of the cultural and historical development of society. Studying the experience of the period under review allows us to more fully analyze the situation of contemporary social vulnerability of women as subjects of the process of transformation and modernization.

Drawing on the methodological achievements of modern historical science and previous gender studies, and using a wide range of sources—archival, statistical, journalistic, and administrative—it is possible to compile a complete picture of the transformation of women’s legal and socio-economic status in any other period of historical transition.

Kazakhstan historical science often studies the participation of Kazakhstani women on the fronts of the Great Patriotic War, the position of women in the historical development of Kazakh society, and other issues. For example, in an article by Z.G. Saktaganova, based on documents from the archives of Russia and Kazakhstan, one of the little-studied issues is examined: the participation of Kazakh women who volunteered and were mobilized in 1941–1945 on the fronts of the Great Patriotic War. The article provides an overview of studies that examined the quantitative characteristics of the participation of girls and women from the Kazakh SSR and presents various versions of the gender aspects of the participation of Kazakhstani people in the war. Based on a comparative analysis of mobilization orders, certificates, and reports on their implementation, the author concludes that the number of Kazakh women who went to the front was more than 9,500, which is almost twice as many as is commonly believed in contemporary Kazakh historiography [12; 32]. The article by A.U. Tanalinova examines provisions governing family, marital, and property relations, as well as provisions establishing penalties for crimes committed against women [13; 24].

Discussion

Despite the relative youth of the gender approach, the historiography of the issue is extensive. The issue of gender history has been studied more extensively in foreign literature, since the first gender historians were specialists in women’s history (which was the progenitor of gender history) — mostly representatives of the new wave of the European women’s movement. Among the most significant foreign researchers, Joan Scott [8] is worth mentioning, whose work became a seminal article on gender history. J. Scott notes interesting details in the development of modern history, which has gone from a kind of standard of genderless universal history, essentially ignoring women, to a single-gender “monological” female history, and further to a “dialogical” history of gender relations. Thus, in her opinion, an enriched and renewed social history emerges, broadening the understanding of the social and including all spheres of social relations in both public and private life.

J. Scott writes about four components of gender relations in society that can be used to conduct successful sociological and historical analysis: first, a complex of cultural symbols that take shape in stereotypical representations of society and thus set the mental background for people’s lives; second, norms based on symbolic representations that take the form of religious, educational, and political doctrines; third, social institutions (from family and kinship to state); and fourth, gender subjective identity [8; 1062].

L.P. Repina writes about one of the most actively developed areas of gender history — the study of the “imaginary world” [11; 52], perceptions of gender roles and differences. This kind of interest is closely linked to new trends in historiography, with the expansion of its epistemological foundations against the backdrop of a general anthropological and linguistic shift in the development of contemporary humanities and a new convergence between history and literature.

Regarding the specifics of gender historical methodology, we note N.L. Pushkareva’s point of view on the synthesizing function of the gender approach in history. She writes: “Gender methodology helps to overcome the narrowness of separate, independent ‘histories’—the histories of women and men—because its function is not complementary (additional), compensatory (making up for something), or revising (old ideas, old approaches: all of which were functions of feminology), but rather a synthesizing one” [5; 40].

According to I.V. Pinchukova, gender studies in history today are mainly carried out by combining traditional socio-economic issues for historians, an anthropological approach, and key aspects of gender interactions. This involves the use of achievements in related (and relatively new) areas of scientific knowledge—oral history, psychohistory, everyday history, history of mentality, etc.—which requires serious professional training. To obtain valuable and important results, the most productive approach is one that involves the coordinated work of an entire team of specialists. In this case, even the broad education of a particular researcher will not be able to help solve all the problems at hand using the maximum number of available methods. Gender methodology inherently involves collaboration between scholars from a wide variety of disciplines and schools [14].

It is precisely owing to women’s history that researchers are now turning their attention to new types of historical sources that were previously considered insufficiently relevant. These are primarily sources of a personal nature, including women’s diaries, correspondence, and memoirs. Now that women in history have

been given the opportunity to be seen and heard, it has become possible to uncover and explain the facts of their special position in society. Western historians began to study manifestations of inequality based on gender. According to G. Bock, research on women's history, in which gender relations appeared as an autonomous historical variable, opened up new perspectives. It was established that gender relations are as important as all other types of human relations. It was understood that excluding relations between the sexes from the “great questions” of history blocks the path to a new, deeper understanding of the past [15; 24]. The most generalized concept of gender history is recorded in an article by W. Frevert, where the author defines it as a historical subdiscipline that studies attitudes toward gender differentiation in past societies, as well as how it was described and what significance was attached to it [16; 28].

Gender methodology does not exist in isolation from other methodologies. Among the features of gender research methodology and techniques, N.L. Pushkareva notes an interdisciplinary approach, the method of terminological analysis, the method of participant observation, a preference for qualitative methodology over formal quantitative description, analysis of biographies and interviews, the method of empathy, and discourse analysis [17]. According to the professor, gender studies are based on Thomas Kuhn's theory of scientific revolutions. Previously, it was believed that differences between the sexes were inherent in nature and historically unchangeable, but this concept allowed history to be viewed as a changing environment [18].

Conclusion

In contemporary humanities, owing to the development and institutionalization, as well as the interdisciplinary nature of gender studies, it has become possible to consider women's experiences in those areas of knowledge where they had previously been ignored and not considered independently.

Thus, the subject area of gender history can be viewed, on the one hand, as the history of the formation and functioning of a system of relations that stratifies society on the basis of gender, and on the other hand, as historically developed ideas about “masculine” and “feminine”, designated as categories of social hierarchical order. Gender history emerged precisely when a significant amount of research on women's history had been accumulated and, at the same time, the question arose about improving the methodological capabilities of the latter.

The beginning of the intensive development of gender history dates back to the 1990s and coincides with a change in the subject of historical sciences. Instead of “long-term structures”, scholars turned their attention to the specific fates of ordinary people over a limited period of time, and historical and literary essays began to be published in which authors reflected on the impact that individuals can have on the course of history. Instead of a utilitarian approach to sources of personal origin, the “biographical method” began to be practiced, where the focus was on reconstructing one or more destinies and the influence of socio-economic and political cataclysms on them. All these changes allowed for the formation and development of a truly gendered history, which was intended to unite the history of women, the history of men, the history of sexuality, and the history of queer communities.

Proponents of gender history, who study historical periods well documented by sources, prefer qualitative methodology to formal quantitative description, analysis of biographies and interviews to figures and graphs, which, according to some scholars, are more typical of official, traditional science oriented toward a male value system and a system of evidence (androcentric).

The emergence of an independent field of research and the development of a methodological framework have allowed some researchers to speak of the emergence of a new specialized historical discipline—gender history.

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Гендер — тарихи талдаудың категориясы ретінде: гендерлік тарихтың әдіснамасы

Тарихи ғылымды дамытудың қазіргі кезеңінде зерттеудің перспективалы бағыттарының бірі — тарихи талдаудың жаңа әдіснамалық мүмкіндіктерін ашатын және тарихтағы әйелдердің рөліне қатысты мәселелеріне назар аударатын гендерлік тарих саналады. Мақала әлеуметтік-мәдени контексті талдауға бағытталған гендерлік тарихтың негізгі әдіснамалық принциптерін анықтауға арналған. Бұл жағдайда гендерлік көзқарас мәдениетте және тарих саласында қалыптасқан «гендерлік нормаларды» анықтауға байланысты белгілер мен бейнелер кешенін талдаумен анықталады. Осы тұрғыда гендерлік талдауға адамның қоғамдағы жағдайын анықтайтын гендерлік сараланған әлеуметтік институттар да ұшырайды (білім беру жүйесі, саяси жүйе, отбасы, жұмыспен қамту нарығы), бұл белгілі бір тарихи кезеңде әйелдердің белгілі бір қызмет саласына қатысуының толыққанды көрінісін жасауға мүмкіндік береді. Мақалада феминизм теорияларын қалыптастыру жағдайында гендерлік зерттеулердің пайда болуы мен дамуы, оларды академиялық салаға біріктіру және гуманитарлық білімнің әртүрлі салаларында гендерлік зерттеулер әдіснамасын қолдану мәселесі қарастырылған. Автор тарихты зерттеуде гендерлік тәсілдің қолданылуын, сондай-ақ тарихи және пәнаралық зерттеулерде гендерлік категорияның перспективаларын талдаған. Сонымен қатар гендерлік тарихтың пайда болуы мен қалыптасуын, оның әдіснамалық аппаратын, гендерлік тарихи әдіснаманы қолдану мүмкіндіктері мен перспективаларын зерделеген.

Кілт сөздер: гендер, гендерлік тарих, гендерлік қатынастар, гендерлік зерттеулер, гендерлік иерархия, гендерлік тарихтың әдіснамасы.

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Гендер как категория исторического анализа: методология гендерной истории

На современном этапе развития исторической науки одним из перспективных направлений исследований становится гендерная история, открывающая новые методологические возможности исторического анализа роли женщин в истории. Статья посвящена выявлению основных методологических

принципов гендерной истории, направленных на анализ социокультурного контекста. Гендерный подход в данном случае определяется анализом комплекса символов и образов, сформировавшихся в культуре и связанных с определением исторически сложившихся «гендерных норм», сформированных в области истории. Гендерному анализу в этом контексте подвергаются также гендерно-дифференцированные социальные институты, определяющие положение человека в обществе (система образования, политическая система, семья, рынок трудоустройства), что позволяет создать полноценную картину участия женщин в той или иной сфере деятельности в определенный исторический период. В статье рассматривается вопрос возникновения и развития гендерных исследований в условиях формирования теорий феминизма, их интеграция в академическую сферу и применение методологии гендерных исследований в различных областях гуманитарного знания. Авторами данной статьи проанализировано применение гендерного подхода в изучении истории, а также перспективы категории гендера в исторических и междисциплинарных исследованиях. Авторами данной статьи освещены вопросы зарождения и формирования гендерной истории, ее методологический аппарат, раскрываются возможности и перспективы применения гендерной исторической методологии.

Ключевые слова: гендер, гендерная история, гендерные отношения, гендерные исследования, гендерная иерархия, методология гендерной истории.

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