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Gender as an analytical tool in global history

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Shrinking distances and easy displacements, global markets and close economic interdependence - not to mention the growth of multicultural societies - all seem to highlight the need for what Jerry Bentham has called « an architectural framework of human history». ¹ Historians are asking if there has been common historical experiences for people around the world - and what these experiences might have been.

Key elements of human experience may be grand-scale trends such as «rising population, expanding technological capacity and increasing interaction between peoples of different societies». ² These phenomena have marked human history through milleniums, and studying the cultural variations of human agency in such fundamental fields seems a valuable approach to a global past. However, this grand-scale approach is not devoid of methodological problems. Focussing on universal human experiences may weaken the researchers attention to the historically specific and loosen the ties to verifiable source material. ³ A less comprehensive approach, lending historicity to common human experiences, may be to study the importance of a certain region to global history, or to choose a specific period of time, attempting to analyse culturally determined trajectories on the road to central historical moments. If universal history sketches frameworks for common human experiences, such frameworks will need to be complemented by studies of their cultural variations at local and regional levels..

The question has also been raised, whether a global history approach necessitates new ways of thinking. In order to fully explore global human experiences, the Danish historian Erling Ladewig Petersen has suggested that «A fundamentally new framework of conception and inquiry, able to capture the life *in toto* of the whole of mankind since the dawn of time» will be needed ⁴ This seems a rather daunting task, but as a contribution to try develop «a fundamentally new framework of conception and inquiry» and at the same time as an example of a central point of human experience, I would suggest exploring the gendered character of any society, the gendered character of most historical phenomens, in short, the application of gender analysis to global history.

Gender - an important analytical category.

Little seems easier to observe than that any given society, regardless of time and space, has comprised girls and boys, men and women. The same may be said of any social group, be it class, caste, or ethnic group. In fact, the gender division cuts vertically through all horisontal stratifications. Nevertheless, this observation has only during the past decades been of importance to historians.

Why were historians until fairly recently blind to the easily observable workings of gender ? A short look at Western historiography may offer an explanation. During the 19th century, as history turned into a scientific discipline, gender was increasingly understood as an unchanging biological given. The making of societies, in short the making of history, was perceived as the result of men's activities while women were allotted the biological task of reproducing the population. The perception of masculinity and femininity as based on immutable biological facts stripped gender of historical interest and made it a field for the natural and medical sciences.⁵

During the past decades, historians have challenged this paradigm by tracing the historical construction of the understanding of sexual differences. Departing from Aristotle's assumption of the existence of only one sex, seeing women as embryonic, unfinished males, the understanding of biology changed through the dichotomy created by Christianity, equalling men with spirituality, women with materiality. As from the end of the 18th century, the two-sex-model was further developed by the decisive importance given to biology through Darwinism and the medical sciences.⁶ Not till the 1960/70's was the distinction made between sex as a biological concept and gender as «a constitutive element of social relationships based on perceived differences between the sexes», and as «... a primary way of signifying relationships of power», to use Joan W. Scott's excellent definition.⁷

Understanding gender as a historical construction, not as a biological given, gender analysis in the beginning focussed on one gender, women, and mostly served to retrieve women's historical experiences. Gender relations, understood as relations between women and men, were seen as hierarchically constructed. Different theories of patriarchy have been applied to explain men's dominance over women. Carole Pateman, for one, has argued that a gender hierarchy accounts for 18th century contract theories on the relationship between individuals and the state.⁸ Constructing a binary opposition between the public and the private, Locke, Hobbes and Rousseau all located men in the public sphere, women in the private. Hence, only men were seen as political agents. Consequently, also, only men's actions have been of interest to historical research. Neglecting the private sphere, researchers have been blind to what Pateman calls 'the sexual contract' i.e. men's patriarchal rights over women.

Contesting the sharp divide between the public and the private and between men and women, other historians, notably Leonore Davidoff and Catherine Hall, have pointed to the mutual dependency existing between these two realms of life, and between men and women.⁹ Also, gender as an analytical category was soon used in conjunction with other social categories, such as class, race and ethnicity, deconstructing the essentialist understanding of femininity and lately also of masculinity. A third concern of gender history is to analyze «the often silent and hidden operations of gender that are nonetheless present and defining forces in the organisation of most societies».¹⁰ As R.W. Connell has pointed out the workings of gender may be seen as a process where relations, situations and institutions are more or less gendered, and where the meaning and the consequences of gender may change over time.¹¹ This means that gender analysis does not just add a new field to historical studies, it also leads to new understandings of well-known historical phenomena which at the outset may seem to have nothing to do with gender.

Historians are now analysing the interaction of gender with class, ethnicity, race, culture, nation, etc., uncovering the multiple understandings of these central social phenomena. Gender is seen as a basic social structure, interacting with all other social structures. In any culture, in any society, gender will have an impact on the socialisation of the individual, on distribution of work, on responsibilities and rights in the family and in society, and gender relations have been at work in politics as well as in economics. When societies change, so do gender relations, and changes in gender relations influence other social relations. Consequently, gender as an analytical category should be of the utmost importance also to global history.

In the following I shall argue that gender analysis may not only serve to make visible women as objects of and agents in forming human experiences. Gender analysis also points to the

gendered character of men's experiences and agency. Further, gender analysis may help to highlight the multiple hierarchies, the complicated web of gender, class, ethnicity and race, at work in the interaction of people of different cultures. My observations are mainly based on the history of the 19th and 20th century which is my own field of research and my main focus will be on cross-cultural encounters.¹² Let me, however, start by indicating the fruitfulness of gender analysis also in other contexts.

Gender analysis of global human experiences.

Broadly speaking, all the three key elements of global human experience outlined by Jerry Bentham lend themselves to gender analysis.

Within 19th and 20th century history, *the question of rising population* took the form of measures to secure the optimal size and composition of a given population and to control population growth. Whatever the aim of population policies, the target of actions to implement these policies were families. At the individual level, women and men were affected in gender specific ways. Political tools such as economic initiatives were directed at heads of households - mainly men - and medical initiatives, in the form of contraception, abortion and sterilisation, were directed mainly at women. Studies of how women's reproductive capacities have been regulated world-wide, would highlight cultural variations in hierarchies of gender, race and culture at work in population policies. At the same time it would point to one of many gendered power structures, the importance of motherhood to gender hierarchy. The need to control women's fertility has even been seen as a result of men's wish to be sure that their property would be inherited by their own progeny, and thus as the cornerstone of global patriarchy.¹³ Gender analysis contributes to knowledge of great importance to the construction of a global framework for analysing population policies

As for *expanding technological capacities*, the global process of industrialisation is an important example. Did gender matter for this process? Without going deeper into this central part of universal human experiences, let me just point to the fact that the labour force engaged in the process of industrialisation was clearly gendered. Women in most western industrialising countries made up around one third of factory workers, while in Japan they were well over fifty percent. In certain trades, women dominated the labour force. In the textile industries, for instance, around the turn of the century, women made up 80% of the workers in Japan, and around 50 and 60% in the United States and the United Kingdom respectively.¹⁴ Women everywhere constituted an even cheaper workforce than their male counterparts. Consequently, the existence of a gendered workforce contributed greatly to the accumulation of capital necessary for industrial expansion. Expectations that women would constitute a malleable and piecemeal labour force were quite often fulfilled. Nevertheless, sharing the dismal social conditions of male workers, women workers were, from an early moment, also striking for higher wages and better working conditions. Gender analysis provides a richer understanding of the global process of industrialization.

In this paper I have chosen to expand on *the increasing interaction between people of different societies*. This interaction took many forms. For the past couple of centuries, criteria for including or excluding individuals and groups in a given society have been at work in colonialisms and imperialisms as well as in the construction of nations and nation states. Within both these themes the importance of gender is indisputable.

Analysing the construction of nations, historians have pointed to a number of what seems to be global criteria for inclusion in or exclusion from the national community. They have analysed the assumption of gender-specific duties to the nation and unravelled cross-cultural parallels and differences in strategies and argumentations as to gendered national citizenship. They have also focussed on the cross-cultural phenomenon of the importance of gender to national symbolism, be it in national rhetoric, in the invention of national characteristics or as expressed in women's and men's attire.¹⁵ In all these fields, for most researchers the intertwining of gender, class and race has been important.

First and foremost, they have tracked the gendered trajectories into political citizenship within democratic nation states. Interesting universalities have been the priority given to white men with ample economic resources which for a long time made class an important criterion for exclusion. Race - or skin colour - had the same effect, but regardless of class and race, gender worked to make women the last group to be included in the nation through political citizenship.

The fear of giving women access to the public space of politics was, among other things, expressed through traditions of limited physical mobility for women. This was especially important for women from advantaged social groups. Where women's work outside the privacy of the home was needed for economic survival of the household and family, restrictions were less severe. Class sufficed to exclude such women from political citizenship. The means to limit women's physical mobility were, however, culturally determined. They ranged from physically debilitating limitations, expressed most harshly in the Chinese tradition of footbinding, to the practice of purdah, containing Indian and Muslim women within zenanas and harims, to the milder forms of psychological socialization of Western women to stick to the home, or at least to certain well-defined 'respectable' public places. Although limited physical mobility did not mean that women were completely without power, an important part of the struggle for women's inclusion into the nation through political citizenship became the necessity to conquer access to public spaces.¹⁶ However, when that struggle was more or less won, the gendered meaning of political citizenship took new forms.

In this process, groups of women would cooperate across cultural divides, but class, caste and race would at times interfere with otherwise long term cooperation based on gender. National identities could have the same effects. This was the case, for instance when, tired of being perceived as 'children' to be educated by western 'mothers', many Indian women in the 1920's declined further assistance from British women in their fight for emancipation.¹⁷ A similar situation may be found in Northern Europe, as for a short while around the turn of the century, national conflicts estranged Swedish and Norwegian middle-class feminists.¹⁸ To socialist women class identity weighed heavier than national loyalty. They continued cooperation across national borders. Within each nation, as well as cross-culturally, experiences of class and race identities were gendered. Conflicts between women and men of the same class might result in gender-specific organisations, at the national as well as at the international level. No doubt, gender analysis is helpful in unravelling the complicated web of shifting identities and shifting loyalties at work in cross-cultural encounters.

Defining the nation and creating national identities implied a perception of difference, signalling the formative characteristics of groups to be included in the nation as well as the 'otherness' of groups to be excluded from the nation. *Cross-cultural encounters implicit in colonialisms and imperialisms* were parts of this same process.¹⁹ No longer limiting the

understanding of these fields of history to a question of polarisation colonizer/colonized or metropole/colony, historians now highlight the multiple and distinct imperialisms-colonialisms, and the multifaceted interaction of different understandings of gender.²⁰

Take as an example the importance of gender in British/Indian relations at the end of the nineteenth century. Mrinilina Sinha has shown that men's gendered experiences, in this case the question of *how to understand masculinity*, was an integral part of British imperialist policies. To British officials masculinity was seen as expressing itself in an athletic and strong body, in the ability of self-control and restraint and implicitly in the capability of governing, not only oneself, but also others. As opposed to this ideal, Bengali middle class men were depicted as small and frail, with no self-control, especially in sexual matters, as witnessed through the tradition of child marriages. Implicitly, such men were deemed incapable of governing themselves, let alone a whole society. This tendency to depict colonized men as effeminate and unworthy of political rights and self-determination has also been found in French colonial policies and within African societies.²¹ A hierarchy of different understandings of masculinity served as a trope for Western superiority, featuring the virility and modernity of the colonizer as opposed to the effeminate traditionalism of the colonized.

Himani Bannerji stresses the importance of these observations to studies of a global European identity politics, marked by the construction of binary identities of inferior 'others' and of the enlightened self of Europe.²²

The use of gender as a way of praising or belittling not only individuals, but whole cultures, has been observed also in Enlightenment cultural histories. Combining criteria of race and gender, Western 17th Century authors characterised non-europeans as «hidous» and «dark-coloured» individuals with unsympathetic characteristics such as «more than feminine cowardice.»²³ In cross-cultural encounters, gender has been a useful trope for praise or critique of other cultures.

Another interesting feature is that the colonized as well as the colonizer was understood exclusively as male. Only men were seen as individuals with a personality, with subjectivity and agency. A clear power hierarchy among men was at work in struggles over the extent and the forms of western interference in traditions regulating gender relations. In British colonial discourse, women figured mainly as «subjects to male governance in their own community, and claimed as objects of reform by the British state», as Himani Bannerji has pointed out.²⁴ Nevertheless, a comprehensive literature highlights the importance also of *the interaction of different understandings and practices of femininity* in cross-cultural encounters. Rupp and Taylor have shown that notions of motherhood as well as problems pertaining to the question of violence against women in the late 19th and early 20th centuries had the potential to unite groups of women who worked for women's emancipation across cultures.²⁵ Still, the cult of individuality in western cultures lent other connotations to femininity than did the widespread acceptance of hierarchies inherent in for instance Asian understandings of femininity.²⁶ Subservience to fathers, husbands, brothers - and for young married women to mothers in law - stressed patriarchal dominance as well as the importance of generations to a much higher extent than in the West. Encounters of different understandings of femininity might create problems in the interaction of women from different cultures.²⁷ With a strong belief in the superiority of Western culture and disregard for Asian and African understandings of femininity, some Western women, for instance in their capacity of missionaries and/or teachers, worked to inculcate Victorian perceptions of domestic

femininity in Asian - and African - women.²⁸ Ironically, by idealizing women's roles as wives and mothers, they sometimes obliterated colonized women's importance in agrarian as well as in urban economies. Some of these Western women at the same time, in their own lives, practiced a different understanding of what it meant to be a woman. To a great extent Western missionaries and teachers in the colonies lived independently of fathers and husbands, creating their own careers and acting as masters with great impact on the lives of other people, although even for them family obligations might come in the way of an independent career.²⁹

Male colonizers, on the other hand, may construct a nation of colonized women representing 'true femininity', serving and obeying men. This construction could offer a male refuge from what was perceived as the threats of western emancipated womanhood and at the same time symbolize the loyal colonial subject.³⁰

Other studies point to observations of how *changes in perceptions of femininity influenced perceptions of masculinity - and vice versa*. The problems met by Bengali middle class men in their encounter with the British, reinforced Bengali policy of educating women to become perfect wives and mothers, and not least to act as bearers of Bengali traditions. In the home and family, women were supposed to offer Bengali men a refuge from British criticism.³¹ On the other hand, a study of white South African women's attempts, in the beginning of this century, to gain access to the South African police force sparked off or even forged, the hyper-masculinity of this police that was required to enforce racial domination.³² The mutual interdependence of perceptions of masculinity and femininity is a question well worth pursuing when analysing cross-cultural interactions.

A final example of the importance of gender analysis to the global theme of cross-cultural encounters may be conflicts arising over how to understand and whether *to accept or condemn the traditions of gender relations* in other cultures than one's own. The problem is especially poignant when it comes to intimate questions of family life, questions which are sometimes still of importance for today's multicultural societies.

A certain behaviour may in one cultural context be seen as a presupposition for cultural belonging, in another as violating the dignity of the individual. Historically, these conflicts have been especially highlighted in extreme situations, such as the European encounter with the tradition of female circumcision or the tradition of widow immolation - sati. Both have been interpreted as a result of patriarchal rights over women and have been criticised by Westerners, missionaries, politicians, feminists alike, as expressions of backwards and barbarous cultures. However, studying other cultures with a less westocentric approach, historians have gradually come to understand the heterogeneous character of any culture as well as the multiple meanings of traditions foreign, and even repulsive, to western minds.³³ Let me here concentrate on the problem of female circumcision.

In the eyes of a modern western historian, this tradition will appear as a monstrous attack on young girls, and may be interpreted as an example of men's power to control women's sexuality. Closer analysis of the cultural and political context of female circumcision has, however, revealed, that it might be defended by the women suffering from it, while groups of men, in solidarity with the colonizing power, might combat it.³⁴ The defenders of the tradition saw it as part of a long socialization of young girls into womanhood, comprising

a number of rituals of which circumcision was a part. It also conveyed prestige and influence to elder women, and consequently acted as a marker of female generational status. It witnessed the capacity to endure pain and to demonstrate self-restraint, a capacity needed to be fully accepted in one's own culture. The importance of all this is demonstrated by examples of young girls circumcising themselves when, in 1956 the tradition was prohibited in parts of Kenya.

Knowledge of this legitimisation of female circumcision may help the historian understand why it was defended even by those who suffered from it. Needless to say, the historian would also point to counterarguments, such as the degree of force often connected to circumcision and depending on the form of circumcision practiced, to the medical complications it entailed. She may also emphasize the fact that the tradition was disputed within the culture in question, and that, in some instances, criticism from western missionaries - and later from western feminists- might make circumcision an expression of cultural specificity, to be defended against foreign attacks. Without criticising a culture as such, the historian might in this way try to understand defence as well as attack of a tradition utterly foreign and inhumane to herself.³⁵

The procedure of deconstructing the concepts of gender as well as of culture, in this case adding generations and political/religious convictions (or opportunism), enriches the analysis and gives a much deeper understanding of what is at stake in cross-cultural encounters. This strategy of a nuanced approach may be fruitful also in negotiations of such confrontations in today's multicultural societies.

A final observation concerning cross-cultural encounters may be that men and women to an important extent met other cultures on gender-specific arenas. Men met in public arenas, on the labour market, in political foras, in bureaucratic institutions and even in wars. Although these were not exclusive masculine arenas, cross-cultural meetings for women especially in the Nineteenth and early Twentieth centuries, would to a great extent take place within the private sphere of the home, through benevolent activities .or in schools created by westerners in the colonies.³⁶ Comparative studies of the effects of these gendered meeting places have, to my knowledge, so far not been made. Such studies may reveal gender-specific understandings of and strategies applied to cross-cultural encounters throughout time. They may even prove useful also for understanding today's multicultural societies, where attention is often concentrated on problems on the labour market, on criminality and other fields of mostly masculine activities.

If gender studies of cross-cultural encounters are still few, they signal the importance of gender analysis to well-known themes of global history. Much research remains to be done before we are able to trace patterns of how understandings of gender have influenced these important global experiences, but a full understanding will not be reached without the application of gender analysis.

Conclusion.

The use of gender as an analytical category is expanding also within global history research. Further studies may point at near universalities as well as at cultural differences in gender relations, in women's importance as objects as well as agents in historical change, in men's

gendered experiences and in the importance of gender to the complicated web of multiple hierarchies that have formed human societies.

Gender analysis should by no means be limited to the past few centuries. The very character of gender as an analytical category makes it an excellent tool for historical studies of any period, any society or region. As national and regional gender studies multiply, building stones for a future global gendered history are being made. However, there is no need to wait for this to happen. In some fields, a lot of knowledge is already available to assist the researcher. Historians working with global history may attempt to apply gender analysis to their specific themes, if in no other way, at least by posing the question of the importance of gender and suggesting possible research strategies to answer such questions.

The knowledge to be gained from global gender analysis is important to a full understanding of common human experiences through the ages. It may also have an impact on how we understand today's multicultural societies. In short, there is a lot to gain from applying gender analysis to the field of global history - and a lot to lose by not doing so.

Notes

1. Bentham 1999.
2. Bentham 1999.
3. Heinz and Kocka 1996B. Osterhammel 1996. Blom 1996A and 1999.
4. Petersen 1992 : 16.
5. Blom 1994A: 11-33.
6. Laqueur 1990, Eriksson 1998.
7. Scott 1988 : 42.
8. Pateman 1988.
9. Davidoff and Hall 1987.
10. Scott 1988 (1986).
11. Connell 1988.
12. The present paper only indicates examples of the rich literature on these themes. Exhaustive bibliographies are available in the works cited to further inform the interested reader.
13. O'Brian 1986.
14. Bingham and Gross 1987 : 198- 199.
15. Yuval Davis 1997, Pierson and Chaudhuri 1998, Blom 2000. Dalley and Nolan 1994.
16. Blom, unpublished manuscript, discusses the culturally specific range of arguments, legitimizing or condemning traditions of limited physical mobility for women, as well as the political impact women might wield despite such limitations.
17. See for instance Jayawardena 1995 :91-103 and 123-134.
18. Blom 1996A and 1996B. See also Blom 2000..
19. Research on the importance of gender to colonialisms/imperialisms comprises Africa and Asia. and has so far focussed especially on the history of the British empire. However, increasingly French and Dutch policies are also being analyzed. Among important contributions may be mentioned Hunt 1996, Sinha 1995 and 1997, Cooper and Stoler 1997, Introduction, Pierson and Chaudhuri 1998,, Midgley 1998 and Clancy -Smith and Gouda 1998.
20. Osterhammel 1997 (1995). Cooper and Stoler 1995 and 1997. Hunt 1996.

21. Sinha 1997. Hayes 1996. On colonialism/imperialism and masculinity, see also Dawson 1994 and Dawson 1995. For an inspiring approach to the analysis of historical masculinity, see Tosh 1995 and Tosh 1998.

22. Bannerji 1998.

23. Harbsmeier 1989.

24. Bannerji 1998:30.

25. Rupp and Taylor 1999.

26. For an enlightening discussion of the acceptance of hierarchies in Indian culture, see Chitnis 1988.

27. Yayawardena 1995. Okkenhaug 1999. Melman 1992. Cooper and Stoler 1995, Cooper and Stoler 1997.

28. Burton 1992. Ramusack 1992. Mervat Hatem 1992.

29. Okkenhaug 1999, chapter 7 and 8.

30. Edward 1998.

21. Borthwick 1984.

32. Shear 1996.

33. An inspiring example of this approach is Bell 1999.

34. Raulin 1987. Thomas 1996. James 1998.

35. See Yuval-Davis 1997 : 125-133 of how to dialogue fruitfully about contentious phenomena without creating hierarchies of understandings.

36. Okkenhaug 1999B. Predelli 1998.

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