



## Theoretical-Methodological Reflections around the Gender Approach

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<p><b>Abstract:</b> This article collects some theoretical reflections about the gender approach with the aim of systematizing knowledge related to the subject, both from a theoretical and methodological point of view, to promote skills and behavioral styles with this perspective in the daily work of men and women. From a bibliographic analysis, concepts such as gender, sex, gender, roles and stereotypes are analyzed, in addition to equal opportunities and gender equity. The methodology highlights the importance of operationalizing the gender approach as a category of analysis and the essential elements in this process for its proper use in practice.</p>	<p style="text-align: center;"><b>Review Paper</b></p>
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### INTRODUCTION

The use of quantitative and qualitative approaches is very useful when investigating issues related to the gender approach. In his research on gender, Núñez (2004), states that *"the majority of the investigated sample declares the use of quantitative and qualitative methods, although they favor the latter"* (p.26).

The quantitative approach independently has found fewer spaces in social research; however, it offers essential theoretical and methodological assumptions to successfully carry out scientific research.

In the quantitative paradigm of the research methodology, what is related to the operationalization of the categories of analysis is of vital importance, as well as the determination of the dimensions and indicators through which topics as complex as the social sciences can be evaluated Gender approach.

Interest in the gender issue is growing every day in today's world, because it is currently a priority to defend relations between men and women based on mutual recognition, acceptance of diversity, equality and gender equity. Achieving these genuine attitudes

and behaviors in the subject is the desired result in research of this type.

Gender investigations arise from science, particularly from the social sciences. Serrano (2012) proposes that at the beginning of any investigative process it is necessary to contextualize the background, current state of the problem and its foundation and in this sense gender-focused research has limitations. In his opinion, the state of the literature is still poor in its theoretical framework, which translates into a deficient knowledge of the study phenomenon, which brings serious consequences in the formulation of the research question/objective/hypothesis and consequently in the most appropriate method to solve it. In addition, it specifies that it continues to be difficult to locate scientific production with a gender perspective.

In relation to this, there is currently an increase in research related to gender (González, *et al.*, 2009; Lopez, 2011; Serrano, 2012; Trejo, *et al.*, 2015; Cabello & Martinez, 2017; Vargas, *et al.*, 2020) but in the same way they are scarce and specific because they are mostly focused on the educational field and in a general sense focused on women. Women continue to be the center of attention in these studies because they

consider them to be at a disadvantage in relation to men; This is an issue that must be overcome, not only because it ends up giving women the value they deserve and highlighting the equality between them, but also because it limits and misleads the gender approach by leaving out or paying little attention to men. The mistaken use of the word gender as a synonym for women points to the man as responsible for the possible overcoming of sexism (Hernández, 2014) and perpetuates an inadequate conception of this type of approach. In this regard, Núñez (2004), refers:

Gender includes women and men and you have to look at both. But it is necessary to direct the scientific gaze to men to study their specific attitudes...it does not mean that the studies on women are resolved, but there is more accumulated knowledge about them than about men (p.32).

Likewise, Hernández-Pozo (2013) points out that gender studies are included in texts that are not in high demand or are not available on the Internet, which in practice prevents their use. In addition, other empirical situations of scientific interest are observed, such as the use in practice of conventional language of grammatical genders from an oral or written discourse, in which both men and women are distinguished, but not at a behavioral level because behaviors continue in which differences are appreciated in relation to their roles and opportunities. The stereotypes associated with gender persist, which does not favor the integral development of the subjects regardless of their sex.

It is still difficult for a person who wants to know or investigate the gender approach to find research that clearly and precisely offers the theoretical foundations and methodological aspects for the study of this category of analysis, which is very complex given that it is linked to others and it is not easy to determine which are the indicators that allow their study and identification in daily practice. Its study from a quantitative perspective is limited.

A satisfactory analysis and knowledge of the gender approach should lead to the study of its origins, the different concepts that are linked or interrelated to it, as well as the indicators that allow elucidating in daily practice the behaviors with a gender perspective that are adequate or not, to develop strategies that correct or promote the best behaviors. Consequently, the general objective of the article has been conceived to systematize the theoretical methodological knowledge on the gender approach to promote skills and behavior styles with this perspective in the frameworks of daily life.

### **Developing Approach to the Gender Approach from a Psychosocial Perspective**

Dealing with the issue of the gender approach or gender perspective is complex; however, it is

necessary to contribute to the development of man and the society in which he lives, since a true understanding and application of the approach achieves better relationships between men and women and a full and authentic individual development in the subjects. In this regard, the National Commission to Prevent and Eradicate Violence Against Women (CONAVIM) (2018) states that this perspective favors a deeper knowledge of the existence of both women and men, as well as their relationships; it discusses the stereotypes of education and offers the possibility of obtaining new contents of socialization and links between the subjects; it also points out the importance of finding solutions to the existing variabilities between women and men.

Throughout history, the issue of gender approach has been worked on. When speaking of "gender approach", "gender perspective", "gender vision" or "gender analysis" as it is also known, despite the inaccuracies in the use of the term, an allusion is made, as indicated by the National Commission to Prevent and Eradicate Violence Against Women in 2018, to a conceptual tool, a methodology and in the same way to a "*strategy, a category of analysis, a symbolic construction*". (Velasco, *et al.*, 2010, p.15) which is based on the fact that the differences between women and men are not only due to their biological condition, but also due to the social and cultural attributes assigned to human beings.

These theoretical definitions lead to a deeper analysis where the gender perspective is more than a single and linear concept. Your study it supposes the design of actions, objectives and the definition of subjects as actors responsible for seeing and enforcing this perspective; while it seeks equality, equity and justice between men and women. In addition, it leads to studying categories that in themselves are the object of study but that within the gender approach becomes subcategories of analysis, such is the case of gender.

Since 1949 with the contributions of Simone de Beauvoir have its beginnings in the genre category. In his book "The Second Sex" Beauvoir refers to the formation of women as a process when writing: "one does not become a woman, one becomes one". As a category of analysis it is used by the anthropologist John Money in 1955, when proposing the concept, in English, *gender* in the formation of sexual identity. In the Social Sciences it has been used since the 1970s, first in first world countries (United States and Europe), later spreading to Latin America and the Caribbean, Africa and Asia. It is around these same years that Anglo-Saxon academic feminism promoted the use of this concept to emphasize that the inequalities between women and men are social and not biological.

Subsequently, in the 1980s, gender began to be used more by various disciplines of the social sciences because it proved to be a useful category for placing the

determinants of inequality between the sexes in the symbolic, cultural, and historical terrain.

It is in the nineties at the V World Conference on Women in 1995, in Beijing, China, another significant moment in the history of the genre. There the idea is emphasized and it is taken as an agreement that gender differs from sex; expresses the role and condition of women and men; it is social and can change. In addition, it becomes part of public policies.

Analyzing the origins of gender leads to several essential ideas, one of which is that gender is considered, since its inception, a social construct resulting from a historical-cultural process from the differentiation of sex; being the clearest premise found in any literature consulted and that must be assumed by every researcher.

Another idea is the traditional link of the term to women, which is given by the role of women in the development of the gender concept. It is the woman who uses the term as a weapon to combat the existing differences with men throughout humanity, which also justifies that most of the investigations go towards this side of the coin. However, a correct understanding of the concept considers gender with its two edges: the feminine and the masculine. All those interested in the subject have to know that their studies can be dedicated to both women and men, that is, from the perspective of the gender approach, both analyzes are valid and necessary.

An issue to highlight in this regard is that most of the research on gender is dedicated to women and in some of them only men are addressed as the direct cause of the problems experienced by women, based on the patriarchal culture, rooted for generations, and not as a subject in unequal conditions, also, in certain situations; or at least a more exhaustive analysis of the behaviors, aptitudes and circumstances in which they live and that influence the gender perspective; which would lead not only to implement actions, strategies that help develop and empower women, but also reach men to educate them in equity, respect and thus reduce or eliminate the gaps between them.

It is also in the origins of gender studies that its use and development in the social sciences is recorded, which extends to the present. But even when the social sciences have been the ones that have addressed the issue the most, gender studies must be constituted from transversality.

Transversality in the gender perspective allows reaching all sciences and spheres to achieve the desired changes in the behavior of men and women within the framework of their interpersonal relationships. This concept represents a necessary condition in the

application of the gender perspective, since it is the basis for changing the relations between genders.

Conceiving the transversality of gender is fundamental not only because of its scope in different contexts and actions, but also because in this purpose it presents itself as a strategy with two edges:

It is a double-faced goal: on the one hand, [it works] the inclusion of gender analysis as a fundamental part of any process of design, improvement, monitoring and evaluation of policies, projects and programs mediated by consultations between women and men to integrate needs, viewpoints and concerns in all decision-making processes dealing with these issues. And, on the other, [inculcates] the inclusion of gender knowledge to attend to the academic claims that demand the rupture of the current organization to ensure many meeting points through which they can be accessed, given their character of cross components (Munévar & Villaseñor, 2005, p.53).

In addition to having two edges, the transversality in the gender approach can be expressed in two ways: one in terms of transversal themes and another as axes. In the first, gender contents can be focused and analyzed from different disciplines, highlighting the links and relationships with them. This analytical perspective, as specified by Munévar & Villaseñor (2005), brings with it variations from the methodological point of view, but not in the intention and values that sustain the process. Following this idea, it would seem that assuming the gender perspective as a cross-cutting issue is about the simple fact of establishing relationships and links with those disciplines that appear along the way when the subject is addressed, however, it is considered that it is to go one step further, it is to apply the contents of the gender approach in those disciplines, it is to analyze how the disciplines can contribute and enrich the issues of gender focus to achieve their entrustment. In the second way, regardless of the field where it is applied, there is more than one intention, an organization and planning of the gender contents to be dealt with throughout the entire process of training individuals is required, guaranteeing the exchange between the parties.

In summary, the transversality of the gender perspective should be a principle in the work to achieve the balance between women and men, since this ensures their presence in each of the areas of participation of the subjects, in addition to a methodology for the implementation and fulfillment of said purpose.

### **The Gender Approach and Other Necessary Concepts**

Initially, reference was made to the complexity of the gender approach insofar as its understanding requires understanding other concepts. It is the analysis

of various definitions, reflections and theoretical foundations, which allows us to declare some of these concepts, among them: gender, about which some previous reflections were made, sex, gender roles and stereotypes, as well as equality opportunities and gender equity. Each of these concepts has its peculiarities with respect to the gender approach.

Sex must be studied because it is necessary to clarify the relationship it has with the subject and highlight its importance for it. Sex has been a concept that has always been linked to the issue of gender. The denomination of male and female; and more masculine or feminine, has led in a first impression, to confuse sex with gender and to identify both as equal, before delving into their definitions.

There is a sex-gender relationship, but it does not make them equal; sex refers to the physical, biological condition and with it all the organic, physiological processes that take place in both men and women, while gender represents what is social, what is assigned and built by society for men and women from their biological condition, of their sex. This social construction that describes the genre is not immutable but the opposite; it can vary depending on the place and the historical context.

The definition of sex has always been present in gender studies and it is that from the determination of the sex of the subjects at birth, society builds, establishes and assigns the behaviors to follow. In this sense González, *et al.*, (2009) point out that, according to sex, from an early age, adults educate boys and girls depending on the models of masculinity and femininity established by society, which almost always establish differences and stereotypes that negatively influence their development.

In the social construction that describes the gender, the roles, functions, behaviors, and expectations assigned and expected of the subjects by society, once the sexes have been defined, stand out. It is in the socially established models mentioned by the previous authors that gender roles are found.

Most of the studies denote that it is society that attributes these types of behavior both men and women at birth, since gender is not carried implicitly. It is through the socialization process that these behaviors and expectations associated with sex are learned, since the socialization process, according to Vasallo (2005), refers to "*... the process of internalizing norms, social values and the appropriation of all the social experience that occurs in the individual, providing him the possibility of integrating himself into social life*" (p.6).

This process, as mentioned, begins at birth and occurs throughout the subject's life through different

socialization agents such as: family, school, groups of friends, and the media. All of them, to one degree or another, participate in the construction of gender roles. González (1985), cited by Vasallo (2005), specifies that the vision that man has of his current reality is mediated by his past experience, this in relation to the social determines the regulatory and dynamic character of the personality on the activity. Hence, the above as a whole explains the importance of the agents of socialization and the expression of the past, independently and in their bond, in what has been acquired from generation to generation in the present life of man.

In relation to socialization, it cannot be forgotten, as Vasallo (2005) refers, it is a two-way process. On one side are the social influences that act on the subject and on the other the active processing by him; being in this way object and subject of the social relations in which it participates. González (1985), cited by Vasallo (2005), adds:

The active character of the subject is expressed not only in how he interprets the reality with which he is linked, but also in his behavior in relation to it, which is not a mere "mechanical" response to the stimulus that reality represents. This active character of the subject within the socialization process is an argument for the idea that gender roles vary depending on the culture, the context and the time that projects them, while being specific. (p.24)

Saldívar, *et al.*, (2015) indicate, in an approach to the subject, the social representation of the gender roles of girls and boys has changed in the new generations, especially among women; they allude that the changes favor women and reduce benefits for men. This active role of the subject that shows the socialization process also reveals that it is the subject himself who can transform the reality in which he lives, reconstruct gender roles and the perception that one has of them, because the problem is not the distribution of roles, but rather how they are assigned, ranked and the value that is given to them, in such a way that they favor equality between men and women. In this regard, Velasco, *et al.*, (2010) point out how the example of the roles inside the house for women and those outside for men, shows that the assignment of roles is not the real drawback; Sharing chores is positive, the problem lies in the dismissal of housework and in this case of the woman because she is the one who does it. They argue that it would not be a problem to carry out one or the other task if both had the same value for society, since it does not matter who does them, if both are valuable and necessary.

In general, it can be summarized that gender roles are assumed from birth and throughout life; they are a social construct that guides the modes of behavior and expectations of men and women according to their sex. They are established as gender roles: masculine

and feminine roles. Male roles are related to the public context and are recognized because they imply economic autonomy, authority, power and status. The feminine roles are linked to the private, sentimental and relational space; they do not involve remuneration, recognition, they operate in a more limited scope and with less visibility (López, 2007).

There are several studies that indicate results like the previous ones in terms of gender roles, however, this construction and valuation of masculine or feminine roles do not allow the adequate development of the gender approach, since they show from the beginning an imbalance, a over or undervaluation, as the case may be, in the men and women who are the objects of the approach.

Closely linked to gender roles are gender stereotypes. According to González (1999), they are "*agreed beliefs about the different characteristics of men and women in our society*". (p.84) While Quesada (2014), states that the stereotype is intrinsic and regulates the behavior of a social group. They are thoughtful and superficial opinions that are very fixed and socially accepted that lead to establishing generalities about certain groups in society, spreading from one generation to another.

It is also the socialization process that facilitates the process of learning and appropriation of gender stereotypes. González (1999), specifies that from the sociocultural approach, stereotypes are born in the social environment and are acquired through constant processes of socialization and acculturation. They are the reflection of the subject's culture and history; therefore, they will emerge and be preserved to guarantee favorable social norms for him.

As in gender roles, the family and the school constitute the main agents of socialization that allow their learning; In stereotypes, González (1999) indicates "*gender stereotypes are acquired in a learning process in which, in addition to the cultural factors common to society, the most immediate social context is important, especially the family and the school*" (p.87).

The deep roots, the persistence over time and the use by a dominant group of gender stereotypes make them difficult to modify. In this regard, González (1999), alludes to how numerous investigations around stereotypes indicate their trait of durability over time and from generation to generation while stereotyping people do not require making a change.

Gender stereotypes dictate behavior to men and women; their fulfillment determines their acceptance and inclusion in the society that imposes them. Regarding this function of stereotypes, López (2007) warns that their task is to propose rigid and unique patterns, to which one must adjust in order to be

admitted into society as men and women, that is, they are criteria, common judgments about what is to be masculine and feminine.

Despite the fact that they are difficult to modify, the social, acquired and unnatural character of gender stereotypes constitutes a reason to propose unlearning, modifying and reconstructing gender stereotypes. In his study Quesada (2014), he affirms that gender stereotypes are developed and transmitted in the socialization process since the person is born, that is why their learned and not innate character; so it is possible to modify them despite how deeply rooted the people have them.

Some of the proposed ways to achieve changes in gender stereotypes in society is the addition of cognitive elements to reality through instruction, training, and the use of the media. González (1999) also states that "*a specific form of stereotype change occurs when the roles of a group are modified and when this happens the stereotypes adapt quickly and begin to reflect the new performances*" (p.82). These modifications would be optimal from the birth of the subjects, since from that moment both gender roles and stereotypes of this same type begin to be built.

Gender stereotypes can be positive or negative and affect both women and men, so any proposal for the treatment of both gender stereotypes and roles must include both. Quesada (2014), stated:

The basis for fighting for equality between women and men is not to forget half of the problem; focusing our attention only on women will not solve the sexism and machismo that is patent and latent in our society. This machismo affects us and hurts everyone, although traditionally, it is true, that women have taken the worst part. Therefore, it is necessary not to make policies focused only on women, but if we want to achieve real equality we must involve both parties to the problem; It is extremely important to work in this regard with men, to make them see that inequalities not only affect women, but that the traditional role of masculine man also has disadvantages for them and that it is essential that both genders benefit from the good things that life has to offer sphere of affection and care. It is essential to start from the basis that the problem is not the man (p.132).

Proposals such as Quesada's find a space and echo the gender approach that is presented and defended in this article where in order to achieve equality, the balance between men and women, analysis as a whole is necessary. It is determining to what extent both women and men are limited, what characteristics, aptitudes, attitudes, values and behaviors must be socialized differently, because each one from their

individualities suffers the restrictions that both gender roles and stereotypes bring with them.

A redefinition or deconstruction of gender stereotypes would bring with it a freer and more democratic society, where women and men could freely develop as people and not based on having one sex or the other. It would therefore be an egalitarian society, where success, assertiveness, being a competitive, tenacious and strong person would be valued equally, but the private and domestic space, feelings and care of other people would also be valued. (Quesada, 2014, p. 133)

However, within all the aforementioned categories, 3 essential concepts stand out when it comes to addressing the gender approach: sex, equal opportunities and gender equity.

Regarding equal opportunities, the Murgibe Consulting (sf), refers that it is the legal, social and political power of women and men to move and negotiate resources of all kinds, in equivalent circumstances. It expresses that women and men have equal opportunities in principle to develop certain activities or to enjoy goods and services.

This concept is important and its understanding will allow reality to be better visualized, around the gender approach, to assume behaviors consistent with it and to implement appropriate strategies. And it is that equal opportunities do not refer only to the opportunity itself, to the possibility of, but it is necessary to take into account the conditions, the state in which both men and women find themselves in order to reach, take advantage of, enjoy those opportunities. Only from equal conditions can one speak of equal opportunities. Only if the same starting point is ensured can it be argued that there are equal opportunities for everyone.

Closely linked to equal opportunities is the concept of Gender Equity, which refers to women and men having access to equal results that is, achieving equal goals for both sexes. López (2011), points out that equity is the result of justice in the distribution of profits and commitments between women and men.

An analysis of both concepts leads to recognizing them as the beginning and end points, the extremes of the gender approach, on the one hand, equal opportunities must be considered, with the same starting conditions to ensure that they can access the same results.

In essence, a vision with a gender approach leads to creating, conditioning the path, the contexts, the entire reality so that men and women have the same opportunities from equal conditions and can access, achieve the same results; those who will not be

determined by this vision or position, but will guarantee a fair and balanced process.

### ***The Methodological in the Gender Approach***

In the previous section, various concepts involved in the gender approach were presented. The analysis and understanding of each one of them allow us to have an idea of what the gender approach is. But, how to apply it in practice; how to verify and evaluate them; what and how to assume them from the performance in daily life, is also an edge that reflects the complexity of the gender approach.

These questions also indicate that it is necessary to make concrete, objective those concepts that define the category of analysis in question, in order to measure them and draw up precise actions that allow promoting behaviors and attitudes with a gender approach.

It is here where operationalization plays an essential role, since it helps to determine the dimensions, the subcategories of analysis and, above all, the indicators that detail the gender approach as a category of analysis in a scientific investigation of reality. Said operationalization must take into account as categories the essential concepts that favor their understanding. Casteñeda (2005) cited by López (2011); alludes to and addresses this aspect.

When delving into the study of this question, there are several ideas that must be dealt with and that must be taken into account. Among them, the dimensions that define the gender approach can be multiple and diverse, reflecting the transversal nature with which this category of analysis must be addressed. These dimensions will prevail depending on the context or field of study of interest of the researcher, that is, the gender approach can be studied from the school, the family, the community, the institutions, from the subject himself, individually or collectively.

In the process of operationalizing the gender approach, there are various categories or subcategories that make it up, which is given by the complexity and interrelationship of the gender approach with other categories of analysis, as explained above, and by the variety in their definitions. García (2006), points out that the variety of dimensions favors the study of the social reality of men and women in their historical evolution. However, it is considered that despite the fact that there are several conceptualizations and subcategories of analysis, in the operationalization of the gender approach the variables cannot be missing: sex, gender, equal opportunity and gender equity, since in them are the main indicators of its definition and study.

From the methodological approach to these variables, it is necessary to continue considering the

indissoluble relationship between sex and gender, but it must also be remembered that they are not equivalent. According to the National Institute of Statistics (2015), the Gender Statistics section of the Department of Social Studies, sex is included as a variable that refers to men and women, indicates the biological condition of the participants, the population or sample studied; allows the analysis of gender indicators from both sexes; while gender alludes to the masculine and feminine, it offers the analysis and interpretation of its indicators (roles, values, stereotypes, beliefs) from the social aspect over time in men and women.

Despite the importance of indicators for studying the phenomenon of gender and concretizing the work of those interested in the subject into actions, it was not until the early 1980s that gender indicators began to be thought of, when thinking of instruments of gender measurement to know and assess the policies on men and women. Then, at the V World Conference on Women held in 1995 in Beijing, People's Republic of China, a strategic objective was outlined that demanded the analysis of certain data to be used in the development of statistical methods and in the planning and application of policies for improve women in their economic, political and social development, which shows that the indicators and the analysis of their results have been directed more at women, because although their results are the ones that stand out and demonstrate the existing inequalities, the The sex variable in its category of man is sometimes left untreated in any gender indicator studied, persisting the contradiction between the feminine and the masculine. The gender indicators can be aimed at women and/or men, depending on the intention of the study, however, from the gender perspective or approach, their interrelationship would be recommendable to carry out a true study from this perspective.

Gender indicators must comply with the characteristics of any indicator, reliability, validity, relevance, durability, etc. They can be quantitative or qualitative, or combined within the framework of an investigation, which favors a comprehensive and exhaustive study of the gender approach. In addition, its conception must allow the initial diagnosis of the state or conditions of the gender aspect studied, as well as assess its results as a goal, which supports the transit through two of its essential subcategories: equal opportunities and gender equity. An example of a gender indicator in the educational field is the access of men and women to university studies, in this example the researcher must analyze what conditions men and women are in to access the university, from the point of view of equal opportunities they are analyzing the initial starting conditions that both have or must have in order to access the opportunity itself, which is to study, and from gender equality, equality of benefits and results in this sense must be valued.

## CONCLUSIONS

Based on the contents covered, it can be concluded that thinking about the gender approach is conceiving equal conditions and opportunities for both women and men; concept that must be specified in a transversal strategy. Developing this approach implies transcending the theoretical plane to implement a group of actions that allow reaching the desired balance between human beings.

Its study implies the analysis of other categories such as sex, gender, equal opportunities and gender equity that, although independent categories, help in the field of the gender approach to its understanding from the theoretical and methodological point of view. The analysis of gender stereotypes is also included due to their regulatory role in behavior of this nature.

Regarding the indicators, they are a necessity in the gender approach to guide the practice of those who investigate the subject; In addition to being able to develop and evaluate the policies and strategies that are implemented from the different fields and institutions.

In summary, the gender approach is complex to address both from the theoretical and methodological perspectives; studies can be found from various angles that attest to its complexity, but it is also evident and timely, more and more, to reflect on the subject and systematize its essential ideas, which state that gender is a social construct, its relationship with sex and also their differentiation. In addition to, the importance and necessity of gender indicators for the implementation of strategies to promote modes of action with a gender approach in society.

## CONFLICT OF INTEREST

The authors declare that they have no conflict of interest.

## Contribution of the Authors

The authors have participated in the writing of the work and analysis of the documents. Conceptualization: YAL; Data retention: DGM; Original draft preparation: YAL; Drafting: OMR; Editorial review: OMR; Supervision: DGM

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