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Challenging the norms: Gender Budget Analysis as feminist policy change in sub-national governments

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Abstract

Gender Budget Analysis (GBA) is concerned with the examination and distribution of public resources. It challenges the gender-blind outcomes delivered through established budgetary processes. Characterised as a form of feminist policy change, this paper considers the framing of GBA within the context of political change at sub-national government level in three distinctive sites - Scotland, the Basque Country, and Andalucía – between 2000-2009.
Introduction

This paper draws from a wider research project that charts the adoption and implementation of Gender Budget Analysis over a decade in three sub-national governments - Scotland, Euskadi (the Basque Country), and Andalucía. In considering GBA as a policy innovation, this paper presents gender budgeting as a form of feminist policy change and a summary of the policy frames engaged in the process of adoption of GBA. This extended conceptualising of GBA as feminist policy change builds on literature to date on gender equality policy and specifically gender budgeting as feminist policy change.

Drawing on feminist institutionalism, gender budgeting, policy change, and feminist policy analysis concepts, the paper introduces a Framework of Favourable Conditions (FFC) that sets out the key phases and variables in the adoption and implementation of GBA. Policy framing and the alignment of gender equality objectives as core policy and political objectives of government are presented in the FFC as a “clear conceptual framework”. This paper discusses policy framing for GBA as feminist policy change in the context of political change.

The paper is structured around the key concepts of gender budgeting (GBA), contributory factors to feminist policy change, the framing of GBA in the case study sites, and the presentation of the Framework of Favourable Conditions (FFC) and summary of findings from the evidence as assessed against the FFC.

Gender Budget Analysis (GBA)

Gender Budget Analysis first came to prominence in 1980’s in Australia and then in South Africa at national government level following transition to democracy in 1990’s. From then, the 4th UN Conference on Women in Beijing in 1995 advanced gender analysis of government budgets in the Platforms for Action. Subsequently a range of measures at the EU level, and series of demonstration projects and practice material from UNIFEM and Commonwealth Secretariat in 1990’s and early 2000’s sought to support adoption and implementation.

Gender budgeting, or Gender Budget Analysis (GBA), is an approach to policy making, a meta policy that seeks to eliminate gender bias in public policy outcomes that result from in-built assumptions in the policy and resource allocation processes.
of government. A principal aim of gender budgeting is to integrate gender analysis into economic policy, and government spending and revenue proposals. By following the money – how it is raised and how it is spent - GBA examines the resources allocated to policy proposals and their potential effects on women and men. It seeks to redistribute resources in a way that remedies imbalances in women and men’s use of, access to and benefit from public services and finance. Therefore, the core purpose of gender budgeting is to “change policies, programs and resource allocation so that they promote gender equality and the empowerment of women” (Sharp and Dev, 2004).

Gender budgeting aims to raise awareness of the gendered impacts of policies funded by government budgets. As an approach to policy making, it links gender equality policy and macroeconomic policy by ensuring greater consistency between economic goals and social commitments. Therefore, it aims to advance equality between women and men by challenging the distribution of resources and turning gender commitments into economic commitments expressed in the budget (Budlender et al., 2002; Quinn, 2009; Sharp, 2002; Sharp and Broomhill, 2002).

Since the early 2000’s developments in GBA within EU Member States have been progressed at both national government and sub-national government level. This paper draws on a wider research project where the focus was on the adoption and implementation of gender budgeting as a form of feminist policy change at sub-national government level within ongoing political change – the wheel within the wheel.

**Gender Budget Analysis as feminist policy change**

As a concept and as an approach to decision making on policy and resource allocation, Gender Budget Analysis (GBA) is concerned with change. Furthermore it is a mechanism for feminist policy change. This argument is anchored in the “transformative project and nature of feminism” (Figart, 2005, p.514) which presents gender budgeting as a feminist transformative concept, seeking to shift the dominant paradigm of androcentrism in public policy making decisions on resource allocation, and the institutional processes within which these decisions are made. As a result, it aims to change established ‘gender-blind’ practice within the current paradigm in
which institutions are gendered (Acker, 1992; Beckwith, 2007; Chappell, 2006; Lovenduski 1998, 2005).

How then can feminist policy change, such as gender budget analysis, come about within this dominant paradigm? This is the paradox within gender budgeting. As a meta policy it attempts to secure transformative change by conceptualising gender equality as central to the efficient use of public resources. This thereby legitimises the focus on the budget as a core function of government whose institutional nature and practice are gendered (masculine). However, these institutions are resistant to such fundamental change due to the institutional “stickiness” (Pierson, 1994), that results from self-reinforcing norms making attempts to progress change within the institution difficult (Mackay et al., 2010).

A central contention of gender budgeting is that traditionally policy making, and specifically the process of allocation of public resources through government budgets, is gendered. That is, it occurs within political institutions which reflect the wider inequalities that characterise the unequal lives of women and men globally in relation to political presence and representation, economic and political resources, and differential expectations of life experiences. These differences in access to and enjoyment of public resources are the result, it is argued, of underlying assumptions held by actors and institutions within the policy process that government budgets and resources are gender neutral.

Criticism of the gendered nature of budgetary process, institutions, and actors, extends to the traditional construction of the budget as a “policy institution” (Kay, 2006) concerned with abstract figures and aggregates of money and finance and therefore as such has no direct influence or impact on the status of women and men (Budlender et al. 1998; Sen, 2000).

Advocates of gender budgeting argue that this perspective ignores the fact that the outcomes that follow from public resource allocation are not gender neutral but in effect perpetuate gender inequality as the policy making process itself is gender-blind (Elson, 1997). This blindness to the effects of public policy interventions is the result of a process which occurs within gendered institutions. Assumptions of gender neutrality in public policy and economics, it has been argued, are erroneous as they are “imbued with male bias” (Elson, 1995).
On the basis that “few other governmental activities so consistently affect the everyday life of citizens” (Heclo and Wildavsky, 1974: xi), budgets must look beyond high-level aggregates, and consider the impact at the level of the individual and the household if policy decisions are not to reinforce disadvantage and perpetuate gender-blind impacts (Budlender et al., 1998).

The core purpose of gender budgeting is to “change policies, programs and resource allocation so that they promote gender equality and the empowerment of women,” (Sharp and Dev, 2004, p.1). On this basis then it is possible to characterise gender budgeting as a feminist policy according to the criteria offered by Mazur (2002) whereby feminist policy constitutes actions and policies that are concerned with the

i. Improvement of women’s rights, status or situation relevant to men’s;
ii. Reduction of gender-based hierarchies;
iii. Avoids distinction between public and private spheres
iv. Focuses on women and men;

Borrowing from the categorisation of government gender equality policy offered by Htun and Weldon (2010) gives additional dimensions to gender budgeting as a form of gender equality policy. They consider two types of sex equality policy. The first are “gender status” policies which seek to remedy disadvantage and discrimination against women as women (original emphasis), including the denial of citizenship rights and women’s marginalisation. The second type is “class-based” policies that target the unequal distribution of resources and sexual division of labour. These policies call for public resources to shift women out of the unpaid, household or domestic sector by funding public provision of care services (Htun and Weldon, 2010, p.208-210).

Arguably, gender budgeting is an approach to policy making that aims to address both dimensions. In the first instance gender budgeting is a gender equality policy that “aims to dismantle hierarchies of power that privilege men and the masculine, and the sexual division of labour that devalues women and the feminine” (Htun and Weldon, 2010, p. 208). By seeking to remedy exclusion and marginalisation from political, democratic and constitutional processes, and encourage greater
acknowledgement of women and participation by women in the budget process, it is a ‘gender status’ policy. By targeting the sexual division of labour and the economic and social inequalities that flow from this, gender budgeting is also a ‘class-based’ policy in that it seeks a more equitable distribution of resources between women and men. In particular, it aims to equalise the status of all women by extending economic resources and civic rights so that access to publicly funded services, and the increasingly marketised provision of alternative forms of care, is not restricted to women with higher incomes or greater access to financial resources. When classified as a gender status policy (Htun and Weldon, 2010), the aims of gender budgeting can be theorised as concerned with equality of citizenship, through the intention of gender budget analysis to open up the budget process to greater democratic participation and transparency.

**Factors contributing to feminist policy change**

Recent debates in feminist policy analysis explored the significance for change of the policy venues and actors (Annesley, 2010, Annesley and Gains, 2012) and the importance of women’s representation in political institutions (Childs and Krook, 2009; Squires, 2007; Chappell, 2006; Krook and Mackay 2010) the extent to which there are causal relationships between issues and political agendas (Annesley and Gains, 2012); how feminist organisations engage with state reconfiguration (Banaszak et al. 2003) and wider political opportunities structures (Beckwith, 2001, 2005, 2007); and specifically how these dynamics interact at sub-national government level (Ortbals, 2008; Ortbals et al., 2012; Rincker and Ortbals, 2009). In proposing a series of variables central to understanding agenda-setting for feminist policy change Kenney (2003) suggested a greater focus on “insiders and outsiders” in the policy process, as well as greater awareness of discursive politics of policy framing - subsequently developed further by feminist scholars including Verloo and Lombardo (2007). Table 1 summarises these variables as contributory factors for feminist policy change.
Table 1 Factors contributing to feminist policy change

<table>
<thead>
<tr>
<th>Contributory factors to feminist policy change</th>
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<tr>
<td>• Political Opportunity Structures and political change</td>
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<tr>
<td>• Active and engaged feminist organisations</td>
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<tr>
<td>• Representation of women in political institutions</td>
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<tr>
<td>• Openness of government structures</td>
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<tr>
<td>• Effective gender equality architecture/women’s policy agencies</td>
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<tr>
<td>• External influences</td>
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<tr>
<td>• Policy learning and diffusion through transnational networking</td>
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<tr>
<td>• Constellation of engaged actors</td>
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<tr>
<td>• Access to strategic actors in key policy venues</td>
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<tr>
<td>• Favourable economic conditions</td>
</tr>
<tr>
<td>• Time and temporal dimensions</td>
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<tr>
<td>• Critical framing of feminist policy change arguments and demands</td>
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In deliberating on agenda setting and adoption of gender budgeting questions arise about the ‘framing’ of gender equality policy (Kenney, 2003). These have been discussed in the literature particularly in the context of gender mainstreaming (Lombardo and Meier, 2008; Verloo, 2005; Verloo and Lombardo, 2007). These questions also focus on the importance of definition of the ‘problem’ of gender inequality (Bacchi, 2000, 2009; Eveline and Bacchi, 2005) and of country context (Budlender and Hewitt, 2002). Just as there are different interpretations of problems in policymaking, “different ways of framing the problem can generate completely different solutions” (Verloo and Lombardo, 2007, p.35).

Framing is important as gender budgeting is attempting feminist policy change in the mainstream of government business and across all policy areas which, as Annesley highlights, can “carry significant budgetary and fiscal consequences and are more complex to push through” (Annesley, 2010, p.52). Therefore, the actions of local advocates and the responsiveness of government institutions to these demands are also of interest. The comparative case studies in this thesis will explore which actors are involved, how challenges are framed and how institutions respond, and thereby make a useful contribution to knowledge in an area that has been highlighted as under-evaluated (Annesley, 2010; Annesley and Gains, 2012).

Advocates for gender budgeting argue that the dominant paradigm of male bias defines policy issues and responses in the budget, with the result that gender equality analysis is absent from the process resulting in policy outcomes that
continue to disadvantage women. Furthermore, budget processes have been characterised primarily as a mechanism for dealing with problems of constraint upon decision makers concerned with managing scarce public resources (Budlender et al, 1998). This dominant paradigm (Wilson, 2000) is reinforced by the established norms of the principal policy actors (finance departments). Arguably, this framing can preclude a different understanding of the budget as a vehicle for social change because of dominant political drives to maintain or reduce spend.

The prevailing frames that inform and structure policy and political interventions are important in exploring strategies for the adoption and implementation of gender budgeting as an alternative paradigm, in addition to the structural conditions and range of actors engaged (see Hall, 1993; Menahem, 1998; Stewart, 2006). Creating a favourable condition for the adoption of gender budgeting therefore requires consideration of how gender budgeting is framed and the extent to which it is proposed as a strategic fit with or challenge to prevailing paradigms. The extent to which there is evidence of clearly structured argumentation and conceptual rationale for the adoption of gender budgeting as a transformative approach to gender equality policy making and economic thinking was thus a key consideration in the case studies.

**Framing GBA at sub-national level**

Analysis of how policy is framed is concerned with assumptions of multiple interpretations in policymaking and seeks to address such implicit or explicit interpretations by focusing on the different representations that socio-political actors offer about the problem and about the solutions on offer (Verloo and Lombardo, 2007, p.32).

The gender budgeting literature is emphatic on the need for “a strategic vision” (Hofbauer, 2003, p.34) and a “clear focus” (Sharp and Dev, 2004, p. 13) that all stakeholders understand. Without this clarity, “governments were ambivalent about continuing with gender-responsive budgets without a clearly articulated demand (Budlender and Hewitt, 2002, p. 20).

Therefore there is a need for strategic framing and securing a shared understanding of the problem, in this case gender inequality, and the proposed solution. It follows then that if attempts to engage different stakeholders are to be inclusive and
successful, there must be a clearly constructed theoretical and political proposition for gender budgeting articulated by proponents and understood by those charged with its formal adoption in policy or law. As a practical proposition, gender budgeting should not be framed in the “parallel universe” where reality and theory do not meet (Eveline and Bacchi, 2005, p.503). It should reflect feminist politics in practice and the transformative demands implicit in the feminist economics conceptualisation of gender budgeting. For this transformation to occur it can be argued that what is required is a “change in understanding of the equality problematic” (Daly, 2005, p.44); that is “policy makers approaching the ‘problem’ of gender with an altered mindset” (ibid.).

How the proposition of gender budgeting is strategically framed by proponents will impact on how it is formally adopted (Budlender, 2004). For some the best strategic fit may be in framing it as a strategy for supporting effective and efficient government through improving economic performance and efficiency. This coupling of “equality and efficiency dimensions” (Budlender et al., 2002, p.43) may be a strategic fit with other government priorities. In other contexts, a strategy for mainstreaming gender across all policy areas that works towards a gender equality policy goal may be more appropriate. The prevailing context and political paradigms (Wilson, 2000) will influence how gender budgeting is framed, and who thereafter are the principal actors charged with its implementation.

Therefore, a favourable condition forms around having a clearly articulated and shared understanding by advocates and adopters that promotes a series of demands or intentions for change in government processes that all stakeholders understand and can support. This in turn should lead to the formal adoption of gender budgeting, through law, policy direction, or other institutional mechanism.

Analysis across the three case studies considered three types of policy frames that comprise a clear conceptual framework that could contribute to the adoption of gender budgeting on to the government agenda, and potentially its implementation. This analysis identified and explored the alignment between

i. Government Frames - priorities, social and economic policy frameworks, legislative programmes;
ii. Equality frames - commitment to gender equality policy, conceptual frameworks for advancement of gender equality, or wider equalities policy;

iii. Gender budgeting frames, considering how gender budget analysis was presented by advocates and policy entrepreneurs, and how interpreted and responded to by policy actors within formal political institutions.

**Sub-national government as a site for GBA as feminist policy change**

In the wider study upon which this paper is based, three sub-national governments, within multi-level governance structures, were the sites of inquiry into advocacy for gender budgeting. Mainstream and feminist policy scholars alike contend that these structures create new political opportunities (Banaszak et al., 2003; Keating, 2010) and open up the policy space for policy divergence and the advancement of gender equality (Breitenbach and Mackay, 2010; Bustelo, 2003; Mackay, 2008; Ortbals, 2008; Outshoorn and Kantola, 2007; Vickers, 2011).

These opportunities arise from the creation of space at the sub-national level for policy innovation and potential divergence (Giordano and Roller, 2004; Keating, 2009, 2010; Keating et al., 2003). State reconfiguration downloads powers from central government and

is a process that creates its own dynamics, as new agents are brought into being, new issues emerge and regions are constituted both as systems of action and as actors in a new form of territorial competition (Keating and Wilson, 2009, p. 12)

Feminist theorising on state reconfiguration (Banaszak et al., 2003) proposes a four-way classification of the processes of restructuring government arrangements that provides a useful structure for considering the changes in the case study sites. **Downloading** is the vertical transfer of powers from the central state to lower state levels. **Lateral loading** is the horizontal shift of powers to non-elected bodies, such as women’s equality agencies, considered as presenting new relationships for civil society organisations and the state, and new sites of engagement for feminist civil society organisations. **Uploading** describes competences being delegated upwards from the central state to the EU; and **offloading** is the transfer of powers to non-state actors (Banaszack, et al., 2003, p. 7).

Within the general political upheaval of Europe in the 1980’s and 1990’s, one of the most significant changes was the **downloading** of powers from central to sub-state
government in the UK and in Spain (Banaszak et al., 2003; Gunther and Montero, 2009). In 1999, a parliament and government were established in Scotland following a popular referendum in 1997. In Spain, following the transition period after the death of the dictator Franco in 1975, the process of devolution began with the creation in 1979 of the first Autonomous Communities (ACs) in the historical territories of Catalonia, Euskadi (País Vasco) and Galicia. Andalucía followed on a fast track to autonomy with popular support in referenda in 1981.

In a political context where competences are shifting from the centre to new sub-state structures (Gunther and Montero, 2009; Tránchez, et al. 2009) and the relevance of the nation-state is being questioned, there are significant implications for policy change and agents of change. The downloading of key sites of power or competences from the centre to sub-state level or laterally to arm’s-length bodies present feminists advocating gender equality policy change with considerable challenges, and opportunities as to how they strategise and where they focus their efforts to maximise these political opportunity structures (Chappell, 2002). For feminists within government institutions, these new structures can also present potential challenges to assumed (and gendered) institutional practices.

Crucial factors in “shaping political opportunities for feminist movements” (Beckwith, 2001) include the nature of the state itself and its openness to influence when political change occurs. Constitutional reform is a possibility for women’s movements to “re-gender or shift those structures” (Beckwith, 2007, p.318). Thus, the permeability of government structures is a factor in feminist activists’ access to government institutions and strategic actors.

For gender equality policy, “regionalisation in Spain...and devolution in the UK have opened new windows of opportunity for women’s policy agencies, and for women’s movement organisations” (Celis and Meier, 2007, p.11). Experiences in Scotland and of the ACs in Spain suggest that greater innovation and progress have come at the regional government level in terms of women’s political representation and policy content (Alonso Álvarez, 2010; Bustelo and Ortbals, 2007; Mackay, 2010; Ortbals, 2008; Valiente, 2003).
Favourable conditions for adoption and implementation of GBA at sub-national level

Insights from a range of literature contributed to a list of general variables to form a theoretical and analytical framework (Ostrom, in Sabatier, ed., 1999) presented here as the Framework of Favourable Conditions for the adoption and implementation of gender budgeting at sub-national government level.

Figure 1 Framework of Favourable Conditions

The wider research project from which this paper is drawn undertook extensive analysis across all the variables presented in the framework. Through
comprehensive process tracing of government and parliamentary documentation during a ten-year period (2000-2009), 22 interviews with senior policy and political actors in the three governments, and feminist activists and analysts in all three sites. This analysis yielded a considerable volume of findings, results and analysis which are summarised in Table 2. The focus in this paper is how gender budgeting was framed as feminist policy change and the effect that had on adoption and implementation in the three cases.

Table 2 Presence of Favourable Conditions in case studies

<table>
<thead>
<tr>
<th>Favourable Condition</th>
<th>Scotland</th>
<th>Comunidad Autónoma de Euskadi</th>
<th>Comunidad Autónoma de Andalucía</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pro-equality climate</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Responsiveness/receptiveness to external influences</td>
<td>+/-</td>
<td>+/-</td>
<td>✓</td>
</tr>
<tr>
<td>Political change/opportunities</td>
<td>✓</td>
<td>+/-</td>
<td>✓</td>
</tr>
<tr>
<td>Women’s Policy Agency</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Positive approach to governance</td>
<td>✓</td>
<td>+/-</td>
<td>✓</td>
</tr>
<tr>
<td>Engaged women’s organisations</td>
<td>✓</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Understanding of budgetary processes</td>
<td>✓</td>
<td>✓</td>
<td>✓</td>
</tr>
<tr>
<td>Engaged actors</td>
<td>✓</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>Political will and leadership</td>
<td>+/-</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>Clear conceptual framework</td>
<td>+/-</td>
<td>+/-</td>
<td>✓</td>
</tr>
<tr>
<td>Positive institutional arrangements</td>
<td>✓</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>Strategy for continuity</td>
<td>+/-</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>Gender-aware budget</td>
<td>+/-</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>- Gender mainstreaming in policy analysis</td>
<td>+/-</td>
<td>+/-</td>
<td>✓</td>
</tr>
<tr>
<td>- Gender analysis in government processes</td>
<td>+/-</td>
<td>-</td>
<td>✓</td>
</tr>
<tr>
<td>- Gender aware budget documentation</td>
<td>+/-</td>
<td>-</td>
<td>✓</td>
</tr>
</tbody>
</table>
Table 2 categorises the framing of gender budgeting as being a weaker *conceptual framework* in Scotland and Euskadi than in Andalucía. The findings discussed here are a considerably abbreviated summary of the full findings from the wider research project with the result that detail and nuanced analysis have been sacrificed for the sake of brevity in a conference paper.

In the Basque case, the lead advocate was the statutory institute for women’s equality, EMAKUNDE. Drawing on external knowledge and developing expertise, EMAKUNDE sought to engage with the Finance Department of the Basque Government in the early stages of the initiative, 1999-2003. Gender budgeting, or gender-sensitive budgeting, was promoted as consistent with the agreed strategy of gender mainstreaming, as set out in the Third Action Plan for Equality between Women and Men, and aligned with political priorities of economic growth. Although the supporting materials presented well-constructed arguments as advanced in the gender budgeting literature, the rationale appears to have been insufficient to engage finance officials or political interest. Arguably, the proposition advanced by EMAKUNDE failed to convince the Basque Government to act.

Whether the policy position advanced by EMAKUNDE lacked substance is unclear as the government of the CAE had signed up to the action plan. It seems rather to be a case of a lack of conviction on the part of the government itself, as suggested in the interviews. The apparent resistance potentially stems from a lack of commitment to gender equality within the Finance Department, which when added to resistance to changes in the dominant political paradigm of supremacy of financial arrangements that characterise the Basque constitutional settlement it made for robust blockages. It is therefore possible to characterise the experience in CAE as a case of what Elson describes as “lip service about gender mainstreaming” (Elson, 2004, p.633), where gender equality was not a political priority for the government of the day.

In Scotland, a period of conceptual fuzziness blighted attempts to promote gender analysis of the budgeting process and policy formulation in Scotland over the ten years under review. In that time, Scotland has moved through dominant paradigms of social justice to the current focus on economic growth as the overarching purpose of government policy and action. Within these strategic frames, gender equality and...
advancement of women are conceived and presented as possible and desirable outcomes of government policy rather than drivers of policy change or the means through which stated political objectives can be secured. Gender equality has not been clearly articulated in the preferred approach of equalities mainstreaming, and except in gender-specific policy areas such as gender-based violence, it has not been advanced as a primary political priority until more recently.

In contrast, policy and strategy as developed by the government of Andalucía (the Comunidad Autónoma de Andalucía CAA) has stated consistently that gender equality and advancement of women is a political priority and driver of policy content and change objectives. Following a period of building institutional arrangements, developing conceptual and policy frames articulating gender budget analysis as an integral means to progress gender equality as a central objective of economic and social policy, the CAA developed an approach to policy making and budget setting called Project Gender Plus, Proyecto G+. Proyecto G+ has become embedded in the institutional structure to support the implementation of gender budgeting. The integrated narratives of gender equality and economic convergence and growth, contributing to economic and social change, were key factors in the CAA approach. This is a significant distinction from experience there and the other two cases. Inter-related objectives, clearly and consistently articulated over the period of adoption and implementation, provided a robust rationale for gender budgeting as a mechanism for changing both the policy process and policy outcomes. The focus on the budget process was a means of structuring and driving policy change, informed by feminist analysis, and aimed at delivering whole government objectives.

Sub-state government as an arena for advancing gender equality

Following the early Australian experience, it was argued that progressing gender budgeting as a means to advance equality will require advocates to “find new means and spaces within the structures of the state genuinely to contest economic policy” (Sharp and Broomhill, 2002, p.43). The research study explored the opening up of the state through downloading (Banaszak et al., 2003) to devolved sub-state governments and the potential for creating opportunities for debate, a more accessible structure and style of government, and the implications of these developments for advancing gender equality, and specifically gender budgeting.
The permeability of government and parliamentary structures in Scotland contrasts with both CAE and CAA as a much more open system of government. There is substantial evidence of a more open approach to governance and government from the formal institutions of government, a clear legacy and consequence of civil society campaigning for a different system of government and style of politics. Thus, the context into which the Scottish Women’s Budget Group (SWBG), an independent feminist research and lobby group established in 2000, introduced the concept of gender analysis in the new budgetary process was more receptive and positively disposed to alternative approaches that aligned with the attempted characterisation as modern, accessible, transparent and, above all, different from Westminster. SWBG was formed in a form of what Beckwith describes as a more “inclusive” environment (Beckwith, 2007, p.318), positively disposed towards propositions of gender equality, as evidenced by the civil society campaign for equal representation in the new parliament, and the structural arrangements to embed equality in the new institutions. The “opening opportunities” (Beckwith, 2001) of this “state-building episode” (Tarrow, 1996 cited by Campbell, 2005, p.46 in McAdam et al., 2005) created conditions whereby SWBG could challenge an institution - the budget - that contributed to gender inequality, and the powerful actors within the state responsible for these systems. The approach adopted by SWBG fits the typology of women’s organisations seeking institutional change by being a “moderate, influence-seeking, interest group” (Beckwith, 2007). Notwithstanding this fluid context, there were still obstacles to the transition from acceptance of gender budgeting as a concept to its formal adoption in government practice. Principal among these was the conflict between expressed political will for alternative approaches to budget formulation and support for gender analysis, and the problems arising from operationalising them through the equalities mainstreaming approach. This finding is supported by the observation from Mackay on the first decade of the Scottish Parliament describing the “tension with expansive and aspirational ideas, with often confusing consequences” (Mackay, 2009, p.49).

In the CAE, it appears that the dominant political context and discourse of political change did not encompass a priority for the advancement of gender equality. Formal equality plans were a staple of the policy regime for gender equality policy. These contained positive policy commitments to gender equality, which are not
reflected in the style of government and the receptiveness of the Basque Government (GV) to external influences or local advocates for policy change to advance gender equality.

The political opportunity structures in CAE can be characterised in Beckwith’s typology as “closed” and “exclusive” (Beckwith, 2001, pp. 327, 377; Campbell, 2005). Therefore they were not accessible to advocates of gender budgeting. The Finance Department appear to have dominated as a policy elite within the government. Furthermore, the distinguishing features of regional autonomy, as represented in the structure and management of taxation and fiscal policy, appear to have been significant blockages to the advocacy and adoption of gender budgeting. It can therefore be surmised that these distinctive characteristics of the constitutional arrangements of the CAE were resistant to apparent interference or change in a closely defended and highly prized element of the political identity of the regional government.

In all three cases, the impetus for gender budgeting came from transnational diffusion and the activities of femocrats and knowledge and policy entrepreneurs (Campbell, 2005; Kingdon, 1984, 1995; Mintrom and Vergari, 1996). However, it is clear from the evidence that Andalucía is different again from the other two cases. There, government interest was receptive to the concept of gender budgeting as it chimed with the political imperative of improving economic growth and convergence that opened opportunities for necessary societal change, such as gender equality.

The Instituto Andaluz de la Mujer (IAM) was an early advocate, and femocrats within government were strategic “gate openers”. Strong external levers in the early stages of advocacy included the Beijing Platforms for Action, and the economic strategies and treaties of the European Union (EU). Experiences from elsewhere, including the materials from EMAKUNDE and international experts, were then drawn upon in framing the concept to gain resonance internally and strategically made to fit the dominant political discourses of the CAA. These external influences are the only evidence of outsider activity in what has clearly been an initiative led from within government from the outset. This leadership from government and the containment of the initiative to progress gender budgeting is therefore one of the most distinctive features of the CAA experience.
Across all three cases, there is evidence of transnational networking, drawing on the same international experts and on the emerging practice in each of the case study sites as it developed. Although the approach in each case study was context-specific and locally relevant, consistent with the principles of gender budgeting, it appears from the evidence in the case studies that homegrown expertise was not sufficient for making the case to government locally. Advocacy of feminist policy change and the coupling of the principal tool of government economic policy together with gender equality policy was strengthened by being able to point to practice from elsewhere. The use of external expertise also demonstrates astute advocacy by policy entrepreneurs, both inside and outside government. By bringing in expertise and thereby scrutiny from elsewhere, local learning and capacity was enhanced, but so was the leverage for political commitment.

Conclusions

Conceptualising gender budgeting, or Gender Budget Analysis, as feminist policy change draws the concept into the wider policy frame of gender equality policy. This more expansive approach allows for the inclusion of a wide range of variables contributing to feminist policy change and the adoption and implementation of gender budgeting as presented in the Framework of Favourable Conditions.

The evidence presented in the paper demonstrates that a clear conceptual framework is an essential condition for the adoption and implementation of gender budgeting. Clearly framed arguments from advocates, which align with and can be presented as essential to the achievement of whole government priorities, and that are articulated consistently by politicians and officials are essential.

Fundamentally, a political commitment to gender equality as the overarching conceptual framework would provide the most robust conditions for gender budgeting. The advancement of gender equality requires to be central to political vision and goals. The goal of gender budgeting, or even the wider political imperative of gender equality, was variably framed by the three sub-national governments. As a central political objective, gender equality was most clearly framed in economic and social policy objectives in Andalucía with an early realisation of the relationship between economic performance and gender equality as interdependent goals and strategies framed as such and articulated within government.
by ministerial and officials leading the process within government. In Scotland the early focus on a wider equalities agenda meant that gender equality was not articulated as a key political goal from the outset of the attempts to adopt gender budgeting. This put greater focus and emphasis on the role of gender equality advocates outside government, the SWBG acting as policy entrepreneurs, resulting in slow but sustained progress towards policy and process change. In Euskadi, the efforts of a government body, the women’s policy agency EMAKUNDE, were insufficient to engage a resistant Finance Department, underscoring the claims in this research project and the wider literature on the essential need to engage finance departments and effectively align gender equality policy across dominant government policy frames.

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