

UNIVERSIDAD COMPLUTENSE DE MADRID
FACULTAD DE CIENCIAS POLÍTICAS Y SOCIOLOGÍA



TESIS DOCTORAL

**Well being perspective and the gender question in Palestine: a
critical analysis**

**La perspectiva del bienestar y la cuestión del género en
Palestina: un análisis crítico**

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PRESENTADA POR

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UNIVERSIDAD
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**WELL BEING PERSPECTIVE AND THE GENDER QUESTION IN
PALESTINE: A CRITICAL ANALYSIS.**

**LA PERSPECTIVA DEL BIENESTAR Y LA CUESTIÓN DEL GÉNERO
EN PALESTINA: UN ANÁLISIS CRÍTICO**

Ph.D. Dissertation

By

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titulada:

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LA PERSPECTIVA DEL BIENESTAR Y LA CUESTIÓN DEL GÉNERO EN PALESTINA: UN ANÁLISIS CRÍTICO

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RESUMEN

INTRODUCCIÓN

Esta tesis pretende ampliar al conocimiento existente sobre lo que conlleva asegurar el desarrollo sostenible y la mejora de la calidad de vida en los territorios palestinos y las oportunidades reales que los palestinos tienen en el país, mediante el análisis de su bienestar y calidad de vida desde una perspectiva de género y la aplicación del enfoque basado en las capacidades (the Capability Approach). Por tanto, el objetivo de la presente tesis es contribuir a la literatura sobre el bienestar y la calidad de vida en Palestina, la aplicación del enfoque basado en las capacidades en la investigación empírica y los estudios sobre desigualdad de género en Palestina.

Reconociendo que he realizado mi investigación en una sociedad patriarcal y en instituciones que siguen siendo patriarcales, debo generar un contenido de investigación basado en una perspectiva y valores feministas de cara a dar a las mujeres, incluida yo misma, una plataforma para que su voz sea escuchada y llamar la atención sobre las diferentes formas de contribuir al mantenimiento de la sociedad y su bienestar.

La perspectiva de género examina la influencia que tiene el pertenecer a un género específico u otro sobre las oportunidades y roles sociales adscritos a un individuo. En este sentido, estudiar el diseño de las políticas públicas desde una perspectiva de género resulta relevante

al ayudarnos a analizar el efecto de dichas políticas públicas sobre mujeres y hombres en la sociedad y cómo se determinan sus roles sociales particulares.

El objetivo de investigar desde una perspectiva de género incluye no solo la producción de nuevos conocimientos, sino también provocar un cambio social e informar de las múltiples formas de opresión a las que se enfrentan las mujeres en la sociedad. Al estudiar la cuestión del bienestar en Palestina, se necesitan argumentos racionales y una revisión concienzuda. Según Amartya Sen, la revisión y el razonamiento son fundamentales en la búsqueda de justicia. Sin embargo, en su enfoque basado en capacidades, no señaló en ningún caso que esto fuera a conllevar la abolición de todos los intereses en conflicto ni de todas las formas de desigualdad. Una sociedad justa perfecta como tal no existe, pero una sociedad comparativamente justa podría lograrse mediante la agregación de información sobre comparaciones interpersonales de bienestar y las relativas ventajas de sus ciudadanos, así como allanando el camino para el razonamiento público.

En este sentido, el concepto de justicia estará más vinculado al acuerdo entre los distintos miembros de una sociedad dada sobre las instituciones y políticas que asegurarán sus necesidades sin comprometer sus opiniones o valores. De hecho, estas instituciones y procedimientos ayudarán a crear un espacio para el debate público.

Por tanto, la justicia se verá desde un enfoque centrado en la ejecución derivado de las vidas y comportamientos reales de las personas y no de un acuerdo preestablecido de instituciones

dominantes, o de una toma de decisiones desde arriba sin contar con la población local. Este nuevo ámbito de seguridad basado en las vidas reales de las personas ha contribuido a diversas aplicaciones relevantes sobre la evaluación de las libertades, derechos y bienestar, entre las que se encuentra la más influyente obra de Sen: *The Capability Approach (CA)*. En mi tesis, defiendo que este enfoque puede ayudar a hacer que las prioridades y políticas de Palestina, además de ayudarnos a descubrir las razones que se esconden detrás de la permanente situación de injusticia, más allá de las implicaciones políticas del hecho de tratarse de un país ocupado, con el objetivo de asegurar servicios equitativos y efectivos y un bienestar sostenible en los territorios, y aprovechando los limitados recursos aún bajo control de la Autoridad Nacional Palestina. En este sentido, el enfoque basado en las capacidades (CA) conforma el marco teórico y normativo de esta investigación, junto con una variedad de herramientas y prácticas metodológicas desarrolladas en los estudios feministas para evaluar el impacto de género de las políticas y presupuestos públicos desde el enfoque basado en las capacidades. Este novedoso marco se denomina Desarrollo de Presupuestos de Bienestar de Género (Well Being Gender Budgets, WBGB) y fue pionero en Italia de la mano de Tindara Addabbo, Diego Lanzi y Antonella Picchio.

DESCRIPCIÓN DEL PROYECTO DE INVESTIGACIÓN

Mi proyecto de investigación propone una visión analítica de las políticas públicas y los planes de ejecución a través del enfoque basado en las capacidades, con el objetivo de encontrar evidencias sobre qué se entiende por bienestar y cuál es su efecto en la calidad de

vida de las personas. En otras palabras, la investigación pretende proponer a una comunidad en concreto, la palestina en este caso, una forma para gestionar mejor los recursos de su sociedad al tiempo que se reduce la desigualdad y se promueve la igualdad de oportunidades sin discriminaciones de ningún tipo.

En la perspectiva económica dominante, donde la transformación de recursos en ‘bienes y servicios’ y, en el mejor de los casos, su división equitativa entre el conjunto de la ciudadanía se considera bienestar, la cuestión de la desigualdad de género pasa a un segundo plano junto con otras cuestiones: el hecho de tener poder político y derechos de voto, la lucha contra la violencia de género o el acceso a mejores servicios de salud y educación, sin elaborar una solución radical para el problema de la desigualdad de género o modificar el modelo socio-político dominante.

Si mujeres y hombres no son tratados igual tanto en los espacios públicos y en los privados es imposible alcanzar una sociedad libre. El objetivo, por tanto, es garantizar los mismos derechos para hombres y mujeres mediante la creación de un sistema de bienestar basado en la elaboración de presupuestos de con perspectiva de género. Así, se anima a las mujeres a lograr la igualdad en lo que respecta a la participación en la sociedad, el uso de los espacios públicos, las responsabilidades, la igualdad en el hogar, las posiciones de poder, etc. El enfoque basado en las capacidades nos ofrece las herramientas analíticas necesarias para generar políticas que responden a dichos objetivos y su proceso de evaluación mientras estudiamos y comparamos cuestiones tales como las capacidades de las personas, la calidad de sus vidas y su situación real en lo que respecta a sus oportunidades de ser y de hacer, y sus

actividades. Por tanto, estamos estudiando sus oportunidades reales en la vida y no solo los medios para lograrlas.

Las personas son el componente central de la sociedad y su participación en la construcción de políticas y ejecución de planes es la forma de medir el progreso de los procesos de desarrollo sostenible. Para fomentar y hacer posible la deseada implicación de las personas, resulta necesario realizar una profunda revisión de las capacidades y potenciales de la comunidad palestina, junto con la evaluación de los mecanismos actuales para desarrollar estrategias y políticas. Sin embargo, este proceso de evaluación es interdisciplinar y excede lo que una única investigación puede abarcar. Por tanto, decidí elaborar una tesis basada en temas interrelacionados en tres capítulos, que tratan una o varias de estas cuestiones. En cada uno de ellos, busco indicadores de bienestar y género que contribuyan al proceso de evaluación de determinadas capacidades, escogidas según su importancia en cada contexto. En concreto, los temas tratados en los tres capítulos incluirán al menos uno de los siguientes asuntos: salud, empleo y cuidados propios o a terceros.

ESQUEMA DE CONTENIDOS

El Capítulo 1 sirve de introducción de las principales cuestiones y organización de la tesis, además de presentar un contexto histórico y geográfico de la causa palestina, como caso de estudio. Este capítulo define el objetivo central de este estudio, que es, *grosso modo*, el análisis de las posibilidades de adoptar un marco de elaboración de presupuestos de género, combinado con un enfoque de capacidades, para defender un sistema de bienestar sostenible en Palestina. Este capítulo resume brevemente la metodología de investigación, tanto para el diseño de la estructura de la tesis, como para la recogida de datos empíricos sobre el bienestar

en Palestina. Más aún, este capítulo presenta una introducción al enfoque de capacidades, como marco teórico en que se basa la tesis.

El Capítulo 2 presenta una revisión de la literatura académica sobre el bienestar desde el enfoque de capacidades, y las propuestas sobre presupuestos con perspectiva de género más influyentes, con un especial énfasis en aquellos que han sido pioneros y defensores del enfoque de capacidades. Se trata también de desarrollar un marco conceptual y heurístico que contribuya a comprender el bienestar en el contexto palestino, con especial atención a la igualdad de género y las capacidades de las personas. Por otra parte, resume los casos más relevantes de aplicación de este enfoque y del desarrollo de presupuestos de bienestar de género (WBGB).

El capítulo 3 revisa y examina la aplicación del enfoque basado en las capacidades a las auditorías de género, analizando las herramientas metodológicas de Well Being Gender Budget (WBG) y su aplicación en el contexto palestino. Este capítulo se centra en la capacidad de las mujeres palestinas de acceder a los recursos (capacidad de trabajar).

El estudio de esta capacidad de trabajar revelará una gran cantidad de desigualdades de género que permanecen ocultas en las esferas privada y pública en el contexto palestino. Esto resulta crucial para evaluar la participación de las mujeres en la fuerza de trabajo y las diferentes oportunidades que tienen para acceder a empleos y salarios similares a los disponibles para los hombres.

En este capítulo se utilizan fuentes secundarias de datos para recabar información pertinente sobre el *desempeño* logrado por las personas (situaciones reales de ser y hacer) y sobre cómo viven actualmente, lo que permite extraer indicadores relativos y reflexionar sobre la calidad que les ofrece la vida que llevan. Para lograr este objetivo, he utilizado estudios e informes estadísticos recientes sobre gasto público, género y empleo en Palestina, realizados por la Oficina Central de Estadísticas de Palestina (PCBS en inglés) y la Iniciativa Palestina para el Fomento del diálogo global y la democracia (MIFTAH). También he revisado el capítulo del presupuesto público palestino destinado al Ministerio de Trabajo (MOL en inglés) de

Palestina y la legislación laboral en el país. Todo ello junto con el desarrollo de una serie de consultas online para identificar algunos de los requerimientos más importantes por parte de personas palestinas –mujeres y hombres- sobre qué constituían elementos relevantes para su calidad de vida. Esta consulta que pretendería identificar necesidades y requerimientos, que si bien no plenamente extrapolables a la sociedad Palestina en su conjunto, sí que permitían dibujar algunas líneas de interés y detectar dificultades que después se han puesto en relación y discusión con los datos estadísticos.

El capítulo 4 incluye el grueso del análisis empírico de mi investigación, donde examino las labores de cuidados no remuneradas de las mujeres palestinas desde el enfoque basado en las capacidades, en el que me basaré para desarrollar los argumentos a partir de datos primarios recabados durante el trabajo de campo. En este capítulo, defiendo que cuando pretendemos analizar programas presupuestarios, debe determinarse si su aplicación esconde algún tipo de trabajo invisible no remunerado, así como evaluar el impacto que tendrá sobre el tiempo que las mujeres y hombres palestinos podrán dedicar a mejorar su bienestar y calidad de vida. Se trata de una cuestión importante porque en ocasiones puede trastornar la vida de las personas encargadas de ofrecer esos cuidados hasta el punto de retirarse temporal o definitivamente del mercado laboral, con la consecuente pérdida económica y de ingresos personales y la ineficiencia que conlleva en términos macroeconómicos.

Más aún, el capítulo concluye que existe la posibilidad de que los programas presupuestarios oculten el trabajo no remunerado, ya sea invisible o labores de cuidados no remuneradas, en su aplicación. Cuando esto sucede, las personas deberían ser aconsejadas sobre cómo detectar los indicadores y conocer su efecto en sus capacidades particulares y calidad de vida.

El capítulo 5 sirve de conclusión de la tesis al establecer los factores influyentes, las implicaciones políticas y los recursos necesarios para mejorar el bienestar de los palestinos así como su calidad de vida, al tiempo que destaca las limitaciones y retos a los que se enfrenta el presente proyecto de investigación y da recomendaciones para futuros estudios.

METODOLOGÍA DE INVESTIGACIÓN

Con una perspectiva feminista y localizaciones complicadas, esta investigación tuvo que adoptar un enfoque de promoción de derechos, participativa y orientada al cambio en la elaboración de la metodología aplicada durante el trabajo de campo. Al adoptar una postura de promoción de derechos / participativa, declaro que en este proyecto no solo busca respuestas a mis preguntas de investigación, sino que también pretende lograr un cambio y una mejora en el bienestar de los participantes en el trabajo de campo, a quienes considero como uno de los grupos más marginados en mi comunidad. Intento entender nuevas formas de mejorar la calidad de vida de las personas en mi país y la promoción positiva de un espacio común en el que vivir juntos, haciendo un llamamiento para la reforma de las instituciones. Por tanto, pretendo cambiar y mejorar mi propia vida y bienestar también (Creswell, 1994).

Mediante la aplicación del CA al WBGB, pretendo responder a cuestiones relacionadas con los seres humanos en sus vidas privadas y públicas con el fin de evaluar su calidad de vida y bienestar. A ello ha de añadirse el hecho de que las personas estudiadas en esta investigación se definen con distintas y complejas identidades, la mayoría históricamente marginadas, y que sus voces raramente son escuchadas, especialmente en el ámbito de las políticas públicas. Esto exige un cambio de enfoque, desde métodos tradicionales de medida y evaluación para estudiar las vidas de las personas, que solo reconoce los medios de vida de forma numérica y fusión estadística agregada, hacia una evaluación que se centre en lo que importa intrínsecamente: las verdaderas libertades de las personas y los obstáculos que les impiden vivir el tipo de vida que desean. Por ejemplo, esto puede realizarse midiendo las

[x]

oportunidades y capacidades de disfrutar de distintas existencias y actividades, como la capacidad de expresar la opinión propia, moverse libremente por los territorios o disfrutar de una vida saludable y sin enfermedades. En consecuencia, buscamos nuevas metodologías para evaluar y acceder a datos no cuantificables sobre esas personas que nos interesa observar y comprender. Dicho esto, los procedimientos cualitativos son los métodos más adecuados para ofrecer dichos medios, ya que las técnicas cualitativas permiten a los investigadores compartir las formas de comprensión y percepciones de otros y explorar cómo las personas estructuran y dan sentido a sus vidas diarias (Berg, 1989).

Al elaborar este método de estudio y los instrumentos de recogida de datos, se tuvieron en cuenta todas las cuestiones y preocupaciones arriba mencionadas. Por tanto, este estudio ha utilizado algunas de las técnicas cualitativas de recogida de datos de investigación más efectivas que permiten recabar información ilimitada en el terreno (Creswell, 1994; Berg, 1989). En concreto, esta investigación se ha servido de los siguientes instrumentos para recabar los datos empíricos: preguntas abiertas, encuestas de información online, grupos de debate, conversaciones individuales, entrevistas semiestructuradas y observación participante en terreno de los comportamientos de las personas durante sus actividades.

Según Merriam (2002), la utilidad del enfoque interpretativo cualitativo en un estudio es que permite a la investigación social aprender cómo los individuos experimentan e interaccionan con el mundo social. La comprensión interpretativa se elaborará a partir del uso de una metodología cualitativa flexible, la fenomenología y la etnografía; es decir, utilizando diferentes herramientas de investigación como las diseñadas para esta investigación.

La investigación cualitativa permite explorar en profundidad las experiencias vividas de los palestinos y ofrece una comprensión profunda de las formas y medios que utilizan para mantener su bienestar. Ofrece, además, descripciones contextuales de los individuos y profundas descripciones de aspectos de las estrategias (para vivir una buena vida) de los palestinos.

Dado que una parte importante del debate sobre el enfoque basado en las capacidades es cómo ponerlo en práctica, cómo informar las políticas públicas y las reformas del Estado y cuáles son las metodologías necesarias para ello, las metodologías no pueden separarse de su propio análisis y, por tanto, se debatirá en profundidad en el capítulo que detalla su relación con el enfoque basado en capacidades, así como las limitaciones y oportunidades que ofrecen para su aplicación en el contexto palestino.

PREGUNTAS DE INVESTIGACIÓN Y OBJETIVOS

Considerando la complejidad del tema en cuestión, la elaboración de una nueva forma de evaluar y aplicar un presupuesto público y las políticas relacionadas en el contexto de un país ocupado para intentar mejorar el bienestar de las personas, me baso en el conocimiento adquirido en tres lugares de trabajo (Palestina, España e Italia), y mi conocimiento local del contexto social y político palestino. Además, tomo la metodología de Ingrid Robeyns (2003) y sus criterios para el proceso de selección de capacidades pertinentes para un contexto social concreto, Palestina en este caso, así como los marcos italianos y españoles para la medición del bienestar con perspectiva de género.

Consecuentemente, el diseño y la metodología de investigación pretenden responder a la siguiente pregunta:

¿Cómo ha contribuido la elaboración y aplicación de políticas públicas en Palestina a la conformación de patrones de desigualdad de género en la sociedad y al descenso de la calidad de vida y bienestar de distintos grupos sociales, y a reducir las capacidades de las mujeres en concreto?

Una vez completada dicha tarea, era necesario examinar una selección de metodologías para medir el bienestar en el enfoque basado en las capacidades, con el fin de identificar las pertinentes para responder a la siguiente pregunta analítica de investigación: *¿cómo traducir este nuevo conocimiento en sugerencias y recomendaciones políticas útiles? Y ¿cómo identificar las alternativas y acciones potenciales para destacar lo que se considera importante y viable para los palestinos?*

Más aún, cada capítulo incluirá preguntas secundarias concretas derivadas de la central.

Partiendo de los temas propuestos, los objetivos de investigación se redujeron a los siguientes:

- Explorar el constructo del bienestar en el contexto palestino basado en el enfoque de capacidades.
- Revisar las peculiaridades y herramientas de la aplicación de la elaboración de presupuestos con perspectiva de género en el enfoque basado en las capacidades: el Desarrollo de Presupuestos de Bienestar de Género (WBGB).
- Llevar a cabo un estudio en el nivel micro para determinar los indicadores e implicaciones sobre el bienestar a los grupos tradicionalmente marginados, como las mujeres.

OBSERVACIONES FINALES Y CONCLUSIONES

Esta tesis se inició con el objetivo de explorar el concepto de bienestar en Palestina, revisando el presupuesto público desde una perspectiva de género. Dicho estudio ha identificado la naturaleza y diseño actual del presupuesto público y las políticas relacionadas con el bienestar en este país; los factores influyentes y determinantes del bienestar de los palestinos y la calidad de sus vidas; el alcance y recursos necesarios para el desarrollo y sostenimiento del bienestar; y el papel e impacto de las acciones gubernamentales y las políticas en los niveles macro, meso y micro de la economía y del bienestar de la gente.

La tesis ha explorado si la metodología del Presupuesto de Bienestar de Género puede servir para un desarrollo del bienestar efectivo y sostenible, particularmente en Palestina. La literatura teórica general sobre la elaboración de presupuestos de género y el enfoque de capacidades, especialmente en países del sur, resulta inconclusa en una serie de cuestiones vitales relacionadas con el bienestar en zonas de conflicto permanente, como Palestina. A continuación, presento una lista de las principales contribuciones de mi tesis, indicando los principales resultados empíricos que responden a las anteriores preguntas de investigación:

Primero, se ha introducido en esta tesis un marco jerarquizado que categoriza las distintas formas en que el enfoque basado en las capacidades y el Presupuesto de Bienestar de Género, como herramientas metodológicas, pueden mejorar la evaluación de la calidad de vida y bienestar de los palestinos. Este marco sugiere que en el proceso de evaluación del bienestar de los palestinos, debemos centrarnos en sus situaciones reales de existencia y actividades y las oportunidades que tienen en relación con ello; esto es, sus capacidades. En este sentido, el espacio de evaluación propuesto por este marco es el desempeño de las personas.

Segundo, la tesis ha permitido un debate sobre las capacidades seleccionadas de los palestinos, con el fin de poner sobre la mesa la aplicación del marco del WBGB y enfoque basado en las capacidades (CA) al proceso de evaluación del bienestar en Palestina en el ámbito de las políticas.

Tercero, esta tesis aporta una visión de las metodologías aplicadas actualmente en la medición del bienestar en el enfoque basado en las capacidades que se consideran relevantes para el caso de Palestina.

ABSTRACT

Little success over the past decades has been observed in reaching and maintaining well-being of people in conflict regions across the world, both in terms of securing sustainable development and improving quality of life, despite shared efforts of both national governmental, and non-governmental agencies within those conflict regions, and from the outside international community. This doctoral project examines the critical issue of well-being and quality of life of people in continuous conflict regions, by holding forth on Palestine: known for its long-standing conflict and Israeli occupation, as the research case study.

The subject of well-being of Palestinian people was regularly discussed within different resolution agreements with conflicting parties, and foreign policy agendas of key international players, in order to guarantee that these agreements and policies are complied with, and provide adequate attention to the rights of minorities, indigenous people, and other vulnerable groups, such as children and women. However, the current difficult circumstances that Palestinians face daily, and the negative indicators on their well-being status, as well as their health conditions, especially within aforementioned vulnerable groups, postulate that national and international efforts in this regard, remain deficient in achieving their objectives.

Given this, this thesis argues that a radical shift in priorities and policies is urgently needed, in addition to in-depth scrutiny of underlying reasons for the tragedy, to ensure equitable, effective essential services, and sustainable well-being and stability in Palestine. This research suggests that the innovative gender budgeting framework combined with the Capability approach: Well Being Gender Budget (WBGB), can provide the needed radical change in perspective while auditing public budget, and formulating policies in Palestine. As such, the capability approach was the theoretical and normative framework in this research, alongside a selection of methodological tools and practices developed in feminist studies, to assess the gender impact of public policies and public budget, specifically the Well Being Gender Budgets tools.

Thus naturally, the central focus and core objective of this thesis was to develop a hierarchical framework that categorizes various ways, in which the Capability Approach and WBGB methodological tools, can improve the assessment of Palestinian people's well-being and quality of life. Two qualitative fieldworks were conducted in Palestine through this research, to reach that aim and help the assessment described above. The fieldwork was

followed by additional analysis for quantitative aspects of collected data and available literature.

Collectively, this thesis provided a survey on the current applications of the WBGB framework, which considered relevant to the Palestinian case, to forward the exercise of WBGB methodology formed in Italy and Spain, to the assessment process of well-being in Palestine. It also allowed a comprehensive discussion on the selection process of capabilities for the Palestinian people. As a result, this thesis revealed that both, the current Palestinian budget and policy drafting process are not delivering the expected impact, and persist conventional and neutral towards well-being and development issues, and towards gender equality in particular.

Finally, the thesis concluded with defining influencing factors, policy implications, and needed resources for enhancing the well-being of Palestinian people as well as their quality of life, while pointing out the limitations and challenges encountered by this research project and recommendations for future research.

CHAPTER ONE: INTRODUCTION

PREFACE

In 2009, my mother spent four months in a coma. She was hospitalized during that period, and I was her caregiver. Palestinian public hospitals refuse to admit an elderly patient if he or she does not have a person to accompany them. In general, elderly patients are not accepted for admission at public hospitals if they do not have anyone to take care of them while hospitalized. Selecting me to be the caregiver, seemed to most of the other family members ‘the natural’ choice. We did not discuss it. I thought to be the only one ‘free’ of any obligations back then. I was single, unemployed, and most importantly, I am her daughter.

I loved my mother so much, and I never questioned the role of being her caregiver. I never asked myself why it was me and not my brother, who also happened to be unmarried and unemployed through that time. Many years had to pass after my mother’s death, for me to learn that being her caregiver or not, has nothing to do with love and appreciation, but rather it was based on my gender, and social division of work and roles, for men and women in society, including my own family.

This new perspective and sensation of injustice was a burden that I felt I hold only because of my gender position. I had to do something about it. This is how my Ph.D. research journey

and current thesis began. I did not think to be a woman, and my indigenous knowledge as a Palestinian, was a privilege for doing this research, but instead, they served as an obligation to conduct it. Even though these two identities gave me some advantages through this journey, starting with the simple fact of being awarded a scholarship to do my research in a Spanish University. However, finding the starting point was not easy. I knew I needed to answer my main research question that is how women ended up forming the majority of caregivers' population in Palestine, and how that affects their well-being and quality of life, unfortunately, in a negative way in most cases. But also I needed to investigate how we can change that.

In my new position now as a researcher not only as a woman, but as a Palestinian and as a feminist, I also knew the subject needed to be deeply examined, to find out if it is a result of a patriarchal society as it could be in any other place in the world, and not exclusive to the Palestinian case, or if it does come from a failure in managing public money, or maybe both. Failure in managing public funds means public money is being misplaced and misused, rather than pointing to a lack of resources. For instance, the general budget and public policy would not be gender-sensitive, which may result in providing bad services, causing social injustice and negative impact on vulnerable society members: elderly, children, and women. For me, it was obvious that my approach should examine the issue from a gender and well-being perspective in auditing public budgets, in order to reach an answer for my only apparently initial trivial question: Why I was the caregiver for my sick mother?

Through the elementary phase of my research, I figured out that the issue of Palestinian women health and economic conditions were vastly addressed in several studies, but never were tackled from well-being and quality of life perspective, to examine public policy and budget auditing. After four years of research, I ended up learning that Palestinian women's unpaid care work, cover-up and compensate for the government failure in managing public budget and related policies. The unequal division of caregiving roles between men and women in the Palestinian community make women more vulnerable to the negative impacts of the invisible work concealed in managing the public budgetary programs, which leads to substantive implications on their well-being status and quality of life. Thus choosing the Well Being Gender Budgeting (WBGB) and the Capability Approach as the theoretical framework for this research was no surprise. As this framework allows me to reach my research objectives because:

- 1- It is a people-oriented approach and thus encourages a micro-level assessment of the impacts of public policies on citizens and their quality of life. And most importantly, it goes beyond numbers in analyzing the budget; thus, a budget deficit will not be the obstacle in the face of changing the unjust situation of women.
- 2- It is one of the few frameworks that takes a notion of the well-being issue in assessing public budgets.
- 3- The unpaid work and invisible care-work in public and private spheres are some of the critical aspects when measuring deprivation and inequalities between people through the WBGB.
- 4- It is already applied and tested in other countries (for example, Italy, Spain, Turkey), which might serve as a guideline for studying the Palestinian case.

1.1 CONTRIBUTION AND RELEVANCE TO CURRENT RESEARCH FIELD

This research project represents the first doctoral study tackling the issue of quality of life and well-being in Palestine by applying the WBGB framework and the Capability Approach. These aspects were well studied and discussed in Europe and other parts of the world, but have so far not been addressed within the context of a conflict region such as in Palestine.

Palestine at present is composed of three geographically separate occupied territories: The Gaza Strip that is held by Israel under blockade since 2008; the West Bank, where Israel exercises full military control; and lastly East Jerusalem, which is under the Israeli sovereignty.

Israel not only occupies the Palestinian territories but also treats each as unrelated entity. It controls the entry and exit of Palestinians to these territories and restricts their movements between them. This strict control of movement manifests its most inhumane aspects when it comes to Gaza, as Palestinians are prohibited from leaving or entering the area unless they have Israeli permission, which is rarely granted and only for very extreme cases.¹

This research was conducted in the occupied Palestinian territory (OPT) known as the West Bank (WB) not including the Gaza strip, as I hold the documents of a Palestinian resident of the WB, and thus I am not allowed to enter Gaza strip. Having that said, I decided to use Palestine as a reference to the whole OPT through this thesis, for uniformity purposes, but

¹Please refer to B'Tselem website– The Israeli Information Center for Human Rights in the Occupied Territories, for more information

also to proclaim my political position that I express explicitly through this thesis. Palestine for me as a Palestinian, is a unity from the river to the sea, despite the separation of territories caused by the occupation. And a Palestinian is a Palestinian, even if she is a refugee and not allowed to ever return to her homeland.

This research project is societally relevant because it gives us an idea about the well-being and gender problem in Palestinian society and how we can tackle them, empower Palestinian citizens especially the women, and enhance their capabilities individually and in a collective way.

Finally, the completed thesis will be concluded with defining influencing factors, policy implications and needed resources for enhancing the well-being of Palestinian people as well as their quality of life, while pointing out the limitations and challenges faced by this research project and recommendations for future studies. In what follows, I will present a general approach to why the capability approach is valid to study the Palestinian case by tackling the subject of justice in Palestine, in an attempt to pave the way for the next chapters in the thesis by this introductory one.

1.2 BACK TO THE BASICS: THE QUESTION OF PALESTINIAN IDENTITY

If we are to talk about *the question of Palestine*, then we need to answer some basic questions as *what is Palestine?* And *who is a Palestinian?* But such questions, that may seem obvious, are hard to grasp and respond to; in fact, they form part of one of the most controversial issues internationally, for already a long time that is precisely the status of Palestinian territories and who may claim the right to its ownership. My narration below is, of course, far

from being the ‘only one’ it tends to question the ‘hegemonic’ and dominant narratives about the question of Palestine. It also implies my feminist and political positioning in this research. It is difficult for me to think of a different way this question could be introduced, giving the complexity and conflicting character of the situation. However, my claim that I use a political situated approach in my research does not undermine it. On the contrary, it stands on the privilege of situated knowledge, as all subjects in similar positions, and it is open to critical examination (Haraway, 1991; Harding, 2004).



Palestine & Israel map, Source: The Palestine Question in Maps, 1878-2014 (PASSIA, 2014).

So, *what is Palestine?* And *who is a Palestinian?* To respond equitably, there is a historical obligation for recalling more than ten thousand years of different and diverse civilizations that lived in this region, like Ottomans, Arabs, Roman, Byzantines, Philistines, to name few (Nuwayhed, 1991). As well, there is an obligation to define this land geographically, which is the land currently known as Israel and the Palestinian territories, including West-Bank and Gaza.

GEOGRAPHY AND EARLY HISTORY OF ISRAEL AND PALESTINE

The land called Israel and Palestine is a small country in size, precisely 10,000 square miles at present. This land is located on the eastern end of the Mediterranean Sea. Through its long history, its components have varied

considerably in terms of size, population, and land ownership. The State of Israel currently occupies all the territory from the Jordan River to the Mediterranean Sea, fully controls borders, as well as natural and human resources. Egypt borders it to the south, Lebanon to the north, and Jordan to the east. Israel's recognized borders constitute about 78% of the territory now controlled by the State of Israel. The remainder is divided into territories occupied by Israel since 1967 (the Six-Day War) and Palestinian self-governance areas (the Palestinian National Authority - PNA). The Gaza Strip occupies an additional 141 square miles in southern Israel and was controlled by the PNA until the split from the Palestinian state formed in West-bank, and the subsequent Gaza conflict between the two major Palestinian political parties: *Fatah* and *Hamas*, following the *Hamas* emerging victory in 2006 Palestinian elections (PASSIA, 2014).

Palestine has been continuously inhabited for tens of thousands of years, and human transitional patterns between Neanderthal and modern-day humans are still found there. Archaeologists have found hybrid wheat in Jericho dating back to 8,000 BC, making it one of the oldest agricultural activity sites in the world. The Amorites, the Canaanites, and other Semitic peoples associated with the Phoenicians of Tyre entered that land around 2000 BC, and the area became known as the land of Canaan.

Having that in mind, figuring out that this land had a long attachment with the three major messianic religions: Judaism, Christianity, and Islam, requires no intelligence. Thus, a *Palestinian* is, without a doubt, the inhabitant of this land, who holds different identities due to the richness and cultural heritage of the region. Moreover, the very recent identity of the

inhabitants of Palestine is Arabs-Palestinians until the 1948 catastrophe *Al-Nakba*, where indigenous people were displaced and migrated by force.

THE PALESTINIAN EXODUS (NAKBA) AND THE QUESTION OF PALESTINIAN REFUGEES

The *Nakba*, a term symbolizing the mass forced displacement of more than 750,000 Palestinians² from their homes and lands in historic Palestine in 1948, was the success of the Zionist movement - backed by Britain - in controlling the bulk of Palestine and proclaiming Israel. The *Nakba* is also reminiscent of at least 10,000 Palestinians who have been killed in a series of massacres and killings, most of which are still unknown, while three times that number was injured (Ilan Pappé, 2006; Nur Masalha, 2008).

The Palestinian *Nakba* did not begin in 1948, but much earlier. In 1799 during the French campaign against the Arab world, Napoleon Bonaparte issued a statement calling for the

² There is no reliable figures that show the precise number of Palestinian refugees nowadays, as there was never an agency that maintained this data. The UNRWA for example, administers the only registration system for Palestinian refugees. But UNRWA includes only those displaced in 1948 (and their descendants) who were in need of assistance and located in UNRWA areas of operation – the Gaza Strip, West Bank, Jordan, Lebanon, and Syria. This does not include the numbers of internally displaced Palestinians in historic Palestine before 1948, the number of internally displaced persons (IDPs) after the 1967 war, nor the number of Palestinians who migrated worldwide. In a Survey of Palestinian Refugees and Internally Displaced Persons (IDP), conducted in 2015 by BADIL (a Palestinian NGO and resource center for Palestinian residency and refugee rights), stated that at least 7.98 million (66 percent) of 12.1 million Palestinians worldwide, were forcibly displaced.

establishment of a Jewish homeland in the land of Palestine under French protection to strengthen the French presence in the region (Franz Kobler, 1976).

Napoleon's plan did not work at the time; neither had it disappeared. The British revived the idea in the late 19th century, beginning in 1897 when the first Zionist Congress called for a homeland for the Jewish people in Palestine (Nahon, S. U., 1947). After the fall of the Ottoman Empire in the wake of the First World War and the establishment of the British Mandate in Palestine, the British colonial powers began to implement their plan to build a Zionist state on the land of Palestine (Ilan Pappé, 2004).

In 1917, the Balfour Declaration proclaimed British support for the establishment of a "national home for the Jewish people" in Palestine (Balfour Declaration, 1917). This promise came in a letter written by former British Foreign Secretary Arthur Balfour to Baron Rothschild, a leader of the Jewish community in Britain, for transmission to the Zionist Union in Great Britain and Ireland. After that, the Zionists Jews flocked to Palestine with the support of the British (Nahon, S. U., 1947).

The Palestinians did not surrender, and their resistance efforts of 1936 led to an Arab revolt against British imperialism and the new Zionist colonialism. The British crushed the Arab revolt in 1939, and the Palestinians found themselves facing two enemies: the British colonial forces and the Zionist armed gangs that had grown to 40,000 at the time (Ghassan Kanafani, 1972; Matthew Hughes, 2009).

PARTITIONING OF PALESTINE

On November 29, 1947, the United Nations (UN) approved a plan to divide Palestine into two Jewish and Arab states. At that time, Jews in Palestine constituted one-third of the population, the majority of whom came from Europe in the few years before that date, and controlled an area of less than 6% of land of the historical state of Palestine, but the plan proposed by the UN allocated to them 55% of the whole area (UN Resolution 181, 1947 [also known as the 1947 Partition Plan]).

The Palestinians and their Arab allies rejected the proposed plan, while the Zionist movement approved it, especially since it legitimized the idea of building a Jewish state on Palestine land, however, they did not agree to the proposed borders. Therefore, the Zionists launched intensive military campaigns against Palestinians, to seize more of the land of historic Palestine (Ilan Pappé, 2006).

By the beginning of 1948, the Zionists seized dozens of Palestinian towns and villages and forcibly evicted their Palestinian residents from their homes, under the eyes and sights of the British Mandate authorities (Ilan Pappé, 2006; Masalha, 1992; 1997; 2003).

On May 14, 1948, the British decided to end their mandate in Palestine. On the same day, when the British Mandate forces formally withdrew from Palestine, the head of the Zionist Agency David Ben-Gurion announced the establishment of the State of Israel. Shortly after, the world's two most significant powers - the United States and the Soviet Union – recognized the state of Israel, and the Palestinians became stateless (Ilan Pappé, 2006).

The Zionist plans to cleanse the land of Palestine from its inhabitants continued, and they did their utmost to obliterate the Palestinian heritage and culture from existence, and this situation resulted in extended suffering for millions of Palestinian refugees (Ilan Pappé, 2004; 2006; Masalha, 2008). Despite several wars and ground and air raids, despite the occupation and displacement, 88% of the Palestinians still live in the historic land of Palestine and the strip around it in Jordan, Lebanon, and Syria, 46% of these are still in the land of historic Palestine and 42% in neighboring Arab countries. The rest (12%, or about one million people), half live in other Arab countries than those mentioned above, and the other half in Europe and America.³

The Zionists expelled the inhabitants of 531 towns, villages, and 11 urban neighborhoods by force in 1948 and seized their lands of about 18.6 million dunums, or 92% of the area of actual Israel⁴. The Zionists committed more than 35 massacres to achieve the capture of Palestine. The Israeli archival sources showed that 73% of the villages were abandoned due to Zionist military action, 22% due to psychological warfare (the theory of intimidation and terror), and only 5% due to the decision of the villagers (Ilan Pappé, 2004; 2006; Masalha, 2008).

Israeli historian Benny Morris cites a report from the military intelligence SHAI of the Haganah entitled “The emigration of Palestinian Arabs in the period 1/12/1947-1/6/1948”, dated 30 June 1948, affirms that:

³ BADIL, PASSIA and PCBS all present tremendous database on demographic aspects of the Palestinian population including, refugees and the diaspora

⁴ Please refer to appendix 2.

“At least 55% of the total of the exodus was caused by our (Haganah/IDF) operations. To this figure, the report's compilers add the operations of the Irgun and Lehi, which "directly (caused) some 15%... of the emigration." A further 2% was attributed to explicit expulsion orders issued by Israeli troops, and 1% to their psychological warfare. This leads to a figure of 73% for departures caused directly by the Israelis. In addition, the report attributes 22% of the departures to "fears" and "a crisis of confidence" affecting the Palestinian population. As for Arab calls for flight, these were reckoned to be significant in only 5% of cases” (Benny Morris, 1986, p.173).

Therefore, by this new status of seeking refuge, Palestinian people were also forced into sustaining their ‘latest identity’ in particular, in spite other identities that they had or might have, which is: an Arab whose normal place of residence was Palestine before the 1948 *Nakba*⁵ (UNRWA website). As we see, the question of Palestine was from the very beginning and still a matter of identity more than anything else.

As a result, this ‘identity dilemma’ made Palestinians, in a way, to renounce to their different identities and affiliations except the ‘Arab-Palestinian’ one. Whether they were living in Palestine, or live in diaspora, their connection to Palestine (the land) was more of a cultural and spiritual rather than physical existence. Edward Said⁶; the Palestinian-American public intellectual explains this connection:

5 (Derived from the UNRWA definition of a Palestinian refugee), A/RES/2535. “United Nations Relief and Works Agency for Palestine Refugees in the Near East.” United Nations General Assembly.1969. Web.

⁶ **Edward Wadie Said** (1 November 1935 – 24 September 2003) was a Palestinian American literary theorist and theory field of public intellectual who helped found the critical post colonialism. Born a Palestinian in Jerusalem in Mandatory Palestine, he was an American citizen through his father.

“He says: I am from there, I am from here, but I am neither there nor here.

What about identity? I asked.

He said: It is self-defense

Identity is the child of birth, but in the end, it’s self-invention, and not

An inheritance of the past. I am multiple. Within me an ever new exterior.

Myself, I do not define it so that I shall not lose it. I am what I am.

I am my other, a duality gaining resonance in between speech and gesture.⁷ (Darwish, 2004).

This imaginary dialogue between the Palestinian national poet Mahmoud Darwish and his intellectual friend Edward Said, give us a glance of what identity means for a Palestinian, from which we can draw the importance of defining ‘it’ and not to do so, concurrently. It is a weapon to defend ourselves against the occupier claims questioning our existence, indeed, and it is the proof of our right to return to our homeland. But it is also our own ‘invention’ and choice that we seek not to lose, so we do not dare to give it an absolute definition. Our understanding of identity is that ‘what we bequeath and not what we inherit, what we invent and not what we remember,’ as Mahmud Darwish (quoted in Judith Butler, 2012) said once.

Amartya Sen says on identity: “along with the recognition of the plurality of our identities and their diverse implications, there is a critically important need to see the role of choice in determining contingency and relevance of particular identity which is inescapably diverse” (Sen, 2006, p.4). Sen, in his notion of identity here, meets not only with E. Said and M. Darwish’s perspective but also with every single Palestinian. From here, one can understand the origin of the dispute between Palestinians and Israelis: the later insist on retaining one

⁷ Edward Said: A Contrapuntal Reading, a farewell poem by Mahmoud Darwish published in 2004

face only for the identity of the inhabitants of Palestine, namely Jewish Identity. Zionism⁸ worked hard throughout history, to be transformed from a religious identity to a national one. This particular idea has encouraged thousands of Jews around the world with different nationalities to immigrate to the land of Palestine and forcibly replacing its native people. This is what Sen calls the *illusion of identity* as if identity is just a discovery rather than a matter of reasoning and choice (Sen, 2006). Hence, they left their different affiliations and chased only one: that is to be, a ‘Jew’. This singular identity based thinking, not only in Sen’s opinion but many other scholars is the easiest recipe for generating conflict and violence (Said, 1979).

Nevertheless, I do not claim this intended incorrect understanding of identity to Jews or Jewish–Israelis only, as through the long conflict history, many Arab governments and even International powers, worked on planting this idea in the Palestinian Arabs as well as in those of Jews. Now, the reason why this was in favor of Jews and the State of Israel against Palestinians and their right to self-determination is another story. A story that I will try to recall by examining its different attributes in this chapter.

1.3 THE EFFECTS OF ONE IDENTITY ILLUSION

Identity was a matter of concern for Edward Said. As I have mentioned earlier, he was always keen to understand and explain this ‘spiritual’ connection of Palestinians with their land,

⁸ **Zionism** in simple terms is a nationalist movement of Jews that supports the creation of a Jewish homeland in the territory defined as the "promised" Land of Israel, hence, historical Palestine.

For the Palestinians, however, Zionism means the colonial political ideology that uses the Jewish yearning for self-determination and a homeland, as a euphemism for the oppression, expulsion, and ‘ethnic cleansing’ of native inhabitants of Palestine. Much more about Zionism from the perspective of Palestinians can be found in Edward Said famous work: **Zionism from the Standpoint of Its Victims (1979)**

including himself who spent most of his life years living in and traveling to different countries and cultures. Palestine among those various countries was maybe not the most convenient one, regarding his intellectual career enhancement but it was a purely humanitarian issue, which made him questions all his knowledge about affiliations, homeland, nationality, justice, and even human values.

Said himself discovered his controversial 'Palestinian Identity', after the 1967 Arab-Israeli war⁹. The Palestinian always found herself¹⁰ obligated to defend her national prior to whatever other identities that she might inhabit. There has been pressure to identify as Palestinian before identifying as a female, a mother, an artist or a lesbian, for instance. This is a direct result of the unjust situation the Palestinian people, and concretely for the interest of this research, the Palestinian women who found themselves, empty-handed confronting the systemic occupation mechanism, not only the superior military force that can affect their different freedoms (as their freedom of movement for example by arbitrary imprisonment and/ or checkpoints, apartheid, etc.). Or their right to own property, that is affected by house demolition, or confiscation of land, but also by the different accords that emerged, between the Israelis and representatives of the Palestinian who the Palestinian, in general, and the Palestinian women, in particular, never had quite the chance to choose by their free will.

The Palestine Liberation Organization (PLO) founded in 1964, was the sole legitimate representative of the Palestinian people¹¹. PLO regarded as the entity responsible for acting

⁹ Review of Edward Said works before and after the 1967 war

¹⁰ Through this thesis, I will be using the feminine pronouns as generic form for person or human. I believe the choice of pronouns ethically important as it influence in the proper direction of this feminist academic work that is, highlighting women presence in the public sphere against predominant male bias.

¹¹ In a summit conference held in Morocco's capital, Rabat, (26-29/10/74) the Arab States bestowed the status of

on behalf of Palestinians everywhere. This status allowed the PLO to represent Palestinians at the United Nations, open embassies in capitals around the world and enter into international agreements (UN General Assembly (11/74), UN Resolution 3237). It also gave the PLO the capacity to conduct peace negotiations with Israel and to sign a peace agreement that in theory would bind the entity that it is said to represent (the Palestinian people)¹².

In 1993, the PLO secretly negotiated the Oslo Accords with Israel. The accords were signed on 20 August 1993. There was a subsequent public ceremony in Washington D.C. on 13 September 1993 with Yasser Arafat (PLO representative) and Yitzhak Rabin (Israel prime minister, 1974–77 and 1992 until his assassination in 1995). The Accords granted the Palestinians the right to self-government on the Gaza Strip and the city of Jericho in the West Bank through the creation of the Palestinian National Authority (PNA). Yasser Arafat was appointed head of the PNA, and a timetable for elections was laid out which saw Arafat elected president in January 1996, 18 months behind schedule. Although the PLO and the PA are not formally linked, the PLO dominates the administration, through the dominating faction within the PLO, known as FATAH.

Chimamanda Adichie (Tedtalk, 2009), in her remark on *The danger of a single story*, tackled another vital aspect of the singular-identity issue, that is, the question on who has the power and thus the ability to ‘define’ the ‘other’. Not only ‘to tell their story’, but also to make them

sole legitimate representative of the Palestinian people on the PLO. This decision compromised Jordan's claim to the West Bank, though King Hussein did not relinquish the Jordanian claim to this territory until July 1988. full text of the declaration from the Rabat Conference is available online

¹² In 1993 the US and Israel recognized the PLO as the sole legitimate representative” of Palestinian people. This turned the PLO into the official interlocutor of Israel and of the international community for the Oslo Process, leading the famous Oslo accords. The PLO has subsequently been the official party to all agreements with Israel.

the others stuck with one singular identity, and that is to be the only definitive identity/story of those persons.

The Palestinian people have always suffered from this particular problem. The Israeli version of the conflict story was internationally more tolerable and acceptable than theirs, due to many complicated reasons but basically, due to the power superiority of the Israeli over them. The Palestinian found themselves obligated to defend their version of the story and no matter what evidences they have, their story was never able to gain the same credibility as the one of the Israeli. The Israeli who speaks the languages of the West. The one with European descent, thus, the closer to the 'singular identity' with which the average Western person could identify herself.

It was of the interest of political and economic powers that dominate the world, to keep this form of the Palestinian-Israeli conflict: the West versus the East, which subsequently drop all identities that a Palestinian may hold, to keep only a distorted one. A Palestinian, an Arab Muslim.

Then, it was not a matter of choice for the Palestinian to decide to be 'rational', someone who reasons things before acting, while watching her cause converting to a long-standing issue, with no feasible solutions in the near future, and to question International Justice System, a power that masks itself as fair, and yet it is nothing but arbitrary in fact.

In the 'West versus East' conflict, the Palestinian people knew that they were inferior (in the eyes of the 'other'), that is why the question of identity is a controversial question for them. Issues like 'citizenship' is of great importance, while living in a state that treats them as

second-class citizens. A discriminatory State where the killers are the judges and the ones who issue the laws by which the victims are judged.

As a result of this understanding of their position, the Palestinian always felt connected to every liberation movement around the globe. They were in an ongoing search for justice, which created a new way of thinking about the conflict and their struggle. That is not based on power or authority, nor culture clashes, but human rights and freedoms. In fact "the struggle for Palestinian liberation has become a mainstream global civil rights movement of our time" as Bill Mullen, a BDS¹³ activist and Professor of American Studies and English at Purdue University once said, while discussing BDS as an academic freedom (Nina, 2014).

The Western and Arab politicians alike were in favor of this illusion of culture clashes and the idea of fighting the 'other', to protect their existence and interests. They seize differences between cultures, as a justification for creating strict boundaries to keep the 'other' away. This has always led, without exception, to endless conflict and a continuous circle of violence. In this aspect, Edward Said says:

"Cultures and civilization are not something invulnerable or unchangeable; if there is a [true] culture or civilization then it's always a subject to interact and merge with other [cultures], ignorance of others is not a protection strategy. (...) if Palestine to be [thought] of as the place for a certain nation only, then we will be always stuck into this battle of life or death [locked in mortal combat]." (Said, 1998)¹⁴.

¹³ **The Boycott, Divestment, Sanctions (BDS)** movement works to end international support for Israel's oppression of Palestinians and pressure Israel to comply with international law.

¹⁴ Edward Said Lecture / The Myth of the Clash of Civilizations, the University of Massachusetts ISBN: 1-893521-47-8 - Date Produced: 1998

1.4 JUSTICE FOR PALESTINE

I always ask myself if it is possible to imagine the existence of a free and independent Palestinian State after more than 70 years of ongoing conflict, or is it keep on tilting at windmills. I think that one can be somewhat optimistic if we seek to change the ‘trend’ towards understanding and analyzing this conflict and therefore tackling it.

First of all, the international conception of the conflict as an intractable conflict between two peoples over land can easily be approved inchoate. By a general view of any of Palestinian-Israeli clashes since the catastrophe of 1948 and till very lately, the war on Gaza¹⁵. It is in fact, an occupation by an advanced, powerful military state against impoverished, stateless and displaced people. In this light, if the initial understanding of the conflict is wrong, then any approach towards ending it, accordingly, will be inadequate. Hence, emerges the need, while thinking about justice for Palestine, to consider the two interesting and interrelated concepts of reasoning about such ‘unjust’ situation, that Amartya Sen offers in his *The Idea of justice (2009)*: an *arrangement-focused* versus a *realization-focused* view of justice, which he, originally, draw from the two main lines of thinking about justice in the European Enlightenment age. The first line, the *contractual*, based its theory in a definition of perfectly just institutions, and what a just society should looks like, based on a shared social contract. The second line of thinking, took a comparative approach towards defining the characteristics of a just society, and advanced *social choice theory*.

¹⁵ 8 July 2014 – the escalating Israeli aggressions against Gaza strip, the Palestinian UN mission archive, see more at: <http://palestineun.org/category/mission-documents/>

Even though both approaches paved the way for modern distinction between the state and the civil society, giving a lot of weight on individual liberty, democracy, freedom of expression, and defining the characteristics of just institutions and social arrangements, Sen draw more on the second approach for theorizing his idea of justice, as according to Sen, it discusses that people's lives can be influenced by people's actual behavior and social interactions, and not only by the state and its institutions (Sen, 2009).

Sen, in his new realization of the concept of justice, extrapolates in the ancient Indian jurisprudence and the debate between kings and scholars. He, justifiably, brings to our modern philosophical, social and political discussion about justice, the two concepts of *Niti* and *Nyaya*¹⁶ (Vidyabhusana, 1977). The former idea that of *Niti* relates to organizational propriety as well as behavioral correctness, whereas the latter, *Nyaya*, is concerned with what emerges and how, and in particular, the lives that people are able to lead. Thus, the logic of *Nyaya*, or in other words, what kind of society we are dealing with, is of relevance here while discussing the question of justice for Palestine, the long-standing cause that all concatenated world powers failed to resolve to present.

¹⁶ 100 A.D existed the only work that has explicit reference to logic of (*niti nyaya* is questions of Milinda Panha (the Greek king menandor of Bactria) and replies of Bhikkhu Naga Sena on various abstruse matters, first translated to Chinese (317.420 A.D). (see : A History of Indian Logic: Ancient, Mediaeval and Modern Schools - By Satis Chandra Vidyabhusana)

1.5 SEN'S THEORY OF JUSTICE

The main focus of Sen while tackling the subject of justice, is to bring to our understanding a plausible theory of justice, that has much to do with removing or at least reducing 'identifiable injustices' in the world more than anything else, while other Justice theories, are interested more with finding an *Ideal Just Society*, or even more limitedly with defining the perfect *Just Institutions*, while assuming that a *Just Society* will emerge accordingly.

Precedent *Justice Theories* and theorists in general, seek perfection and not a comparison of imperfect but feasible alternatives. Thus, do not offer us such scalability in tackling the issue of justice, in existing communities and problematic issues, such as the Palestinian cause.

Sen, cogently, emphasizes that throughout human modern history, freedoms, equality and human rights advocates, who were concerned in removing injustices (such as slavery, racism, sexism, sectarianism), were not under the illusion of that ending slavery, for example, will produce a just society. On the contrary, they believed this would specifically remove only a concrete injustice.

Sen invites us to embrace the idea that a perfect ideal justice does not give clear traces to what are the real injustices a certain society might suffer from, as there are many shapes of injustices that indicators of a perfect society are incapable of detecting. For example, if we think of the occupation as an unjust situation in Palestine that holds control over country's resources, we should think of innovative ways to deal with it, and not putting the occupation always as an obstacle for enhancing people's lives. We know that while ending the occupation in Palestine is not feasible within current circumstances, a good and reasonable

remedy would be the use of other resources under Palestinian control, which may enhance people's well-being and quality of life. This could be derived from a comparative assessment of other countries facing a similar problem in limited resources. Then, it may be the right thing to do even with the latent fact that these resources are limited, to reach justice. To clarify more, in Palestine we might not be able to have control over all of our water resources, but we can conduct studies for developing policies related to refining water for agricultural use, and so on and so forth.

In a controversial situation, as in the case of Palestine arise a lot of standpoints and conflicting claims. In such a context, and following Sen's argument, there is even a greater room for public reasoning. This long-standing conflict made it difficult, through Palestinian history, to think beyond the occupation, and because of this very reason, it is essential to find new tools to address the needs and improve quality of life for the Palestinian people. As such, the concept of justice will be more connected to what conflicting people have reason to value and wind up with, without compromising their views or values (Vidyabhusana, 1977).

Thus, justice will be considered from a *realization-focused approach* originating from people actual lives and behavior rather than as a preset arrangement of 'overpowering institutions', were people assumed appropriate behavior would be complementary. This new scope of justice that is based on people's actual lives, will pave the way for a lot of important applications on the assessment of people's freedoms and rights, among which stands Sen's most influential work *The Capability Approach*, an approach that this thesis is based on mainly and recall respectively, in all of its different chapters.

1.6 THE ADVANCEMENT OF JUSTICE

A practical approach towards justice, like the one Sen advocates in his *Idea of Justice* (2009), does not dig deep in a search for the *perfect justice* as such kind of justice does not exist. Therefore, there is an urgent need for making comparisons, as I have pointed earlier. Such comparisons would naturally lead to an agreed aggregated set of changes, which are urgently needed in order to reduce some evident injustices in a certain community. However, since similar forms of injustices are seen to be practiced, and easily detected in different regions and communities, then these suggested comparisons are also valid for cross-cultural arguments that deal with the same questions about cases of absence of justice. For example, take the *Apartheid* as a case of injustice and the quests for its eradication in South Africa and those that emerged in Palestine.

But then, raises the justified question about how we can reach to make such comparisons in the first place? Here, institutions can play an essential role in the advancement process of justice by securing scrutiny and impartial outcomes of public discussion and maybe developing an even more essential role in making this space of public discussion available. Sen suggests that such space can be created by enhancing some related freedoms and rights, such as freedom of speech, right to access to information, freedom of the media, as well as enabling actual facilities for debates.

The enhancement of such freedoms and public debate is a crucial issue when we tackle the Justice for Palestine subject, as this is not a pure matter of creating *just institutions* that fit these people who are confined in this particular territory. When we revise the Palestinian-Israeli conflict, we note, not surprisingly, different episodes of intended repression of such freedoms of Palestinians practiced by the Israeli. And that not only occurs inside the occupied

lands but even against all Palestinian voices that take upon themselves to bring the Palestinian question into the public debate. Examples of such events could be deduced from the killing of Ghassan Kanafani, the Palestinian writer and leading member of the Popular Front for the Liberation of Palestine who was assassinated by a car bomb in Beirut by the Israeli national intelligence agency “Mossad” in 1972 (Ensalaco, Mark, 2008). Or the assassination of Naji al Ali, the Palestinian cartoonist, in London on July 22nd, 1987, also by the Israeli Mossad.¹⁷ Or maybe by the multiple death threats directed against Edward Said and the fact that “... he had been spied upon since 1971, four years since he had become a public intellectual active in the politics”.¹⁸

So, here arise another issue related to the reasoned public discussion and the possibility of making comparisons. The question of whether people are able and willing to undertake this reasonable public discussion for the pursuit of justice. Adding to that how risky such involvement would be, for Palestinians in particular, with all the chaos and uncertainty they are living in. Apparently, not even Sen claims that people are all engaged or eager to take different reasonable positions. But what really matters, in this case, is the possibility of the existence of those spaces where they can freely practice their different ideological positions, if institutions take over their responsibility in making this examination process a reality (Sen, 2009).

Another related central issue is whether we have to agree on a particular prominent ground to admonish as the reason for detected injustices, for instance, the Israeli occupation as the

¹⁷ Paul Lashmar and Shraga Elam, published on: Saturday 19 June 1999". For *The Independent*. Retrieved 17 September 2015.

¹⁸ David Price, published in the weekend edition on: January 13-15, 2006 for the: Counterpunch. Retrieved 6 June 2013.

dominant reason for injustice in Palestine. However, this is not the case. In this line analysis of the idea of justice, we can have a strong sense of injustice in many and different grounds and yet, not to be obligated to agree on or adopt a certain line as the ultimate reason for this injustice. Therefore, reasoning and comparisons seem extremely promising tools in looking towards justice in Palestine. We are in need to hear all attentive voices and reasonable positions in the quest for justice. Thus avoiding to be locked in the unavailing quest for the 'hegemonic cause' of injustice.

Consequently, this new orientation of institutions towards a feasible *public discussion* will lead to a new understanding of democracy. This will be not only a *government by discussion* as John Stuart Mill defined it in his essay *On liberty* back in 1859 (Mill, 1859). It will be also the adherence to providing full, not distorted or manipulated information to people to generate a true democratic atmosphere, where citizens can be fully engaged in the public discussion. Hence, for such an atmosphere to become a reality, "democracy has to be judged not just by the institutions that formally exist but by the extent to which different voices from diverse sections of the people can actually be heard" (Sen, 2009, xii-xiii).

This is another clear evidence for the plausibility of Sen's idea about justice, huge change on paper does not change human conditions on earth, and true democracy does not exist forcibly, nor through an 'outsider party' that oblige institutions of a certain way of governance, while claiming that people should decide for themselves. Such evidence can be easily detected through EU declaratory and operational Foreign Policy in the occupied Palestinian

Territories¹⁹ for example, or maybe through the 2003 invasion of Iraq (Barbara Salazar Torreon, 2012), to give another more common example.

This is exactly what Palestinians need: a public discussion where all voices will be heard and aired, even those of different affiliations or factions –which is a prevalent thing in Palestine —, than the ruling party. This makes visible again the profound differences between a justice that is based on *'arrangement-focused'* conception, by seeking perfect just institutions, and the one that is concerned with actual people's needs and practices, that is, *'realization-focused'* justice. Moreover, this kind of agreed arrangement for perfect justice is not feasible and cannot be achieved even in the most open-minded environment with the strictest impartial conditions. Not to mention how difficult it would be in a conflict area that is full of normalization of certain categories and affiliations: such as nation, religion, faction, clan/family, in everyday thinking. In fact, only reason can help us “to scrutinize ideology and blind belief.” (Sen 2009, p.35).

Thus, all these latent reasons that are masqueraded by the focus on 'ending the occupation' as the only and ultimate resolution for justice in Palestine, would not find their way through unless we practiced a reasoning that inescapably involves “a framework for comparison of justice for choosing among the feasible alternatives and not an identification of a possibly unavailable perfect situation that could not be transcended” (Sen 2009, p.9) such as, ending the occupation. In this context, I think that internal negotiations and domestic agreements would be more effective than the attribution of public money and energy on finding accordance with external parties.

¹⁹The researcher Shahrazad el-Far, did interesting work for analyzing this case, in her unpublished paper: EUPOL COPPS: Policing the Palestinians, Failing the State

Then we may reach the point where each one is not only capable of expressing their opinion and argue in its favor, but also willing to accept the fact that other views and arguments do exist. Also to be open-minded about receiving, not only those different positions, but all kinds of information that may lead to new reasoning about disputed issues. Then, and only then, we can be considered reasonable persons who can create *public reasoning* for the pursuit of social justice (Sen, 2009 p 42.43.44).

Of course, there has also been criticism on the possibilities of sustaining such “reasoning”, and who may be recognized with such status. Patterns of inequality deeply enmeshed in social structures may be reproduced in displaying this type of intervention, and very specifically gender patterns of inequality. Thus, special attention would be given to this issue throughout this dissertation, considering it a key aspect in displaying the Capability Approach.

1.7 REASONING ABOUT CALAMITIES AS INJUSTICES

Palestinians need real justice, not only to achieve a minimum humanitarian aid. The typical case, along the Palestinian-Israeli conflict history, when a human disaster occur, such as in the Massacre of Jenin – which took place in the Jenin refugee camp in the West-Bank in April 1–11, 2002—, or in the War on Gaza, –which to date, includes three major Israeli military operations: Gaza War (2008–09), (also known as *Operation Cast Lead*); Gaza War (2012), (also known as *Operation Pillar of Defense*); Gaza War (2014), (also known as *Operation Protective Edge*). In those cases, where a mass killing of unarmed Palestinians was

committed, only protests around the globe could be noticed, including the occupied lands. Such protests are not deemed more than tragedy observational actions. The observational position those protests take is not capable of pursuing a profound diagnosis of the occurred tragedy, so as to be considered as a preventable ‘injustice’, where “those who can take a preventive action had failed” (Sen, 2009, p. 4) to do so. Therefore, a necessary shift, from the *observation* to *reasoning* is needed here for the assessment of the tragedy.

Reasoning offers more room for analysis of real reasons of the tragedy and how could it been avoided in the first place. It does not seem rational or reasonable, that such calamities as the war in Gaza occurred three times within six years. The repeated catastrophe and bloodshed against unarmed innocent people while we claim such horrible actions were not preventable, and to deal with it, every time, as a sudden event that we could not avoid. This is precisely why we need this shift to reasoning about the calamitous situation in Palestine, and especially in Gaza, “the home to a population of more than 1.5 million people, including 1.2 million Palestine refugees” (UNRWA, 2014), who are subject to death at any time.

Yet, we are not escaping the existence of *bad reasoning* about calamities that may result even in more inertness and thus more deaths, as the claims of *government* obduracy or negligence, for not providing safe shelters for its citizens, in the case of Gaza, where Israel prevents entry of construction materials into Gaza since 2008, and the deteriorating economic situation, adding to that the narrow space, overpopulation, and other obstacles, stand as barriers to building shelters sheltering 1.5 million people living in the Gaza Strip, from Israeli missiles and bombs (OCHA, 2011).

“To prevent catastrophes, we need critical scrutiny, not just goodwill towards others.” (Sen, 2009, p. 48). *Critical scrutiny* gives us the chance to move from bad reasoning into better reasoning, to build vital guidelines, in order to deal with different claims and establish a solid ground for appropriate actions in the times of catastrophes (Sen, 2009, p. 36). Perhaps only then was it possible to see better advice for Palestinians, rather than to leave their homes and lands and all that is dear to them for fear of ethnic cleansing in the time of 1948 war (Ilan Pappé, 2004).

In the case of Palestine, we need a quest to define direct indicators to assess the ‘quality of life’ and ‘well-being’ that Palestinians can achieve, rather than just looking at the ‘means of livings’, that they happen to have. Thus, it is important not only to focus on the lives that they managed to lead but also on their freedom of choosing between different ways of living (Sen, 2009, p. 225).

The freedom to choose the life we want to live from different styles of living, give us a chance indeed to change and improve our goals in life, as well as it increases our commitments towards more ‘sustainable development’. A great example of such, is the initiative of two Palestinian agronomists in Gaza: to design a machine for recycling compost, from remnants of cars and vehicles destroyed by Israeli warplanes during the *Cast Lead* war on Gaza (2008-9)²⁰, which led to several similar initiatives empowered by the Gaza

²⁰ It is worth mentioning that this initiative came from the difficulty of treatment of organic fertilizer, as a result of Israel preventing the access of any technical equipment necessary to do so to Gaza. Source: “Designing an agricultural machine in Gaza”, *News report from Gaza* by: Ahmed Fayad, for Aljazeera.net

government, of waste recycling and seedlings planting, etc. All those initiatives may help, in reaching food self-sufficiency in Gaza, in spite of the economic siege, both by Israel or the Egyptian side.

This departure to reasoning while examining injustices is what Sen advocates for in his Idea of Justice. This new approach not only may offer us some domestic remedies for injustices to deal with human or natural disasters, as a solely zonal or regional concern, it may also bring us closer to a global understanding of justice, where inequality and discrimination do not abort vigor for urgent relief, while having a deep parallel diagnosis of the calamity and injustice.

A recent example of this is the Ebola virus disease outbreak. The Ebola virus disease was first described in Africa more than thirty-eight years ago. And “yet there is no proven treatment available for it nor licensed vaccines” (WHO, 2014). But surprisingly, global efforts doubled to find a cure after the arrival of the first cases of infection with EVD to Europe²¹. If we are to reason about injustices in this world, I bet such hypocrisy would not find a chance to occur.

Reasoning apart us from the odd idea that we only set our goals and value things in life in accordance with what their achievement and ends would add to our own life enhancement and well-being only. If this is true, then those goals would not include doing anything for others, as such actions will not lead directly to our interest. Such narrow thinking does not seem to point in the right direction towards even a minimal realization of global justice, as seems to be the basic idea of *rational choice theory* that sees the choices made by individuals

²¹ James Rush for *The independent*, posted on Thursday 09 Oct. 2014

as an endeavor to maximize their own benefits (Sen, 1977). A true rational reflection Sen argues, is ‘what we owe to each other’ to make this world a better place away from self-interest, narrow-minded thinking (Sen, 2009, p 32).

Now, as I have discussed above, freedom gives us the opportunity to choose between different styles of living, as well as the chance to change and enhance our objectives in life in order to reach the ends we want. Furthermore, Sen’s contribution in this aspect, offer us a broader perspective of this new opportunity: that is the ‘comprehensive outcome’. In the comprehensive outcome logic, having the freedom to choose between different opportunities through the whole chapter of one’s life, is vital for her true well-being. Thus opportunity is not to be judged only by its final outcome, or if it leads to the status that person puts in mind in the beginning as the preferred one, but also by her freedom to change her mind and choose a different opportunity to her well-being, even if it was less ranked initially (Sen, 2009, p 229-230). To clarify this point and its relevance, I will try to illustrate the following example: Denise is a young Palestinian woman living in Gaza city. She is also happened to have a Romanian passport because her mother is Romanian. Denise loves her city, neighborhood, and home, and never thought of leaving Palestine to Romania or any other safer place away from Gaza. In the time of war on her city, a complete siege was applied, borders with Egypt were closed, and Israel did not let anyone leave through its crossing point. Now Denise indeed has ended in the same status that she prefers, being home in Gaza. The siege and borders closure were not a major problem for her, nor affected her opportunity to end up with the preferred status she chose from the beginning.

All in all, if we judge the opportunity aspect of freedom only by the status a person ends up (even it was of her preference), then Denise is believed to enjoy her freedom fully, but in

terms of comprehensive outcome, this is not actually true, because she does not fully enjoy her freedom of choice to the point that she can change her mind and to choose another opportunity, thus outcome, like traveling to Romania her second country, or any other place.

Thereby, the process of choice is to be considered of importance here, this “distinction between the narrow and broad view of opportunity” (Sen, 2009, p 230), which opens the door for more deliberation about the concept of freedom.

1.8 INTRODUCTION TO THE CAPABILITY APPROACH

As we shift away from the narrow conception of freedom, -that is concerned and judged only by the ends that a person can achieve-, towards a broader one which is connected to the opportunity aspect of freedom, -thus a comprehensive outcome-, not a singular end result. Hence, with this shifting, we face a new approach for understanding how people’s lives are going in order to judge their quality. That is the *Capability approach*. Whereby a person’s advantage over another is measured by the set of opportunities she has to achieve the things she values in life, thereby, the process she carries out to seize these opportunities and make up her choices, is much more important in this approach than the final situation she ends up with (Sen, 2009, p 231).

As previously provided, the capability approach cares about people’s freedoms to be and to do the things they have reason to value in life, by comparing their capabilities -opportunities- to achieve these different statuses of beings and doings. Thus, the capability approach focuses on providing information about people’s advantages in life in terms of opportunities and does

not propose any “specific design of how a society should be organized” (Sen, 2009, p 232). It is an informational approach that is concerned with people actual lives rather than the means of living. It investigates in our ‘capability’ of creating different ‘combinations’ of choices for different valuable beings and doings, and to be able to compare between them according to our own preferences. Those combinations of beings and doings are called *functionings* in the capability approach. They are also considered more vital than any material possessions, such as income, commodities, etc., when examining the quality of human life (Sen, 2009, p 232-233).

The Capability Approach *can be defined as a human development framework by which human life is assessed by the scope of freedom a person has to pursue opportunities in life and her ability to be and to do, or in other words; what she is capable of in order to enhance her well-being and quality of life (Sen, 2009; Nussbaum, 2011; Ingrid Robeyns, 2012).*

To this end, the capability approach as a political and economic theory brings a significant distinction from its precedents. It is concerned with real opportunities that an individual has, to endeavor the form of life she prefers and values. Other economic frameworks and theories focus on utility-based or resource-based aspects in evaluating ‘how good this individual’s life is’. Thus they determine how successful a person is, in regards to her wealth, income, and so on. Those aspects, according to Sen, have only an instrumental role in this process of evaluating the quality of life, and no *ultimate value* of their own. He sees them merely as means of living, which do not guarantee a good life.

The more famous metaphor used to illustrate the contrast between the capability approach and other theories is the example of a healthy person and a sick person. In this example, the

sick person happens to have a higher income than the healthy one. Thus she has better means of living but cannot transfer them into 'good living' due to her illness which probably, she will use the extra money to overcome. Despite the higher income, she is believed to have fewer opportunities –i.e., capabilities— than the healthy person to pursue the life she might value. In this light, it is not an easy task to decide who the most advantaged one between the two is.

Freedoms and opportunities do not have an instrumental role only in assessing a person's well-being. Hence, the choice is of great importance here, where people will be able to choose between different styles of living and have the cultural freedom to choose different affiliations, at a personal or political level, alike.

Accordingly, the informational features of the capability approach can be involved in many interrelated deliberations, such as:

- Well-being Public reasoning / public policies
- Concept of Justice
- Social change and equality
- Freedoms and self-determination

It is, indeed, a rich framework and a prominent approach towards a better world that may fit for the aim of this dissertation: addressing well-being and quality of life in Palestine. In the next section, I will try to approach these different features and their linkage to the Palestinian case.

1.9 CAPABILITIES' SELECTION PROCESS AND THE PALESTINIAN CASE

The Capability approach can be used as an interesting informational indicator that may tell us where and how to look at people's life. Yet it does not compel us to focus on any specific aspect in life as the most important one, to measure its quality. Here, emerges again, the necessity of public reasoning for the ranking and weighting process of capabilities.

The capability approach, as presented in Sen's work, does not offer any precise weighting nor commensurability criteria to decide on concrete capabilities. Sen rightly argues that the weighting of capabilities can reduce its informational perspective and multidimensional

features. Nevertheless, he suggests that we can conduct this “weighting” process within a specific societal context.²²

The roadmap suggested by Sen to carry out this public discussion consisting of the selection of capabilities includes the case study of a defined group of people or specific society to find out what are their disadvantages and how may they affect their quality of life directly. Such disadvantages might be, for instance, lack of specific resources, or the violation of individual freedoms. Sen puts up a lot on the ‘diplomatic’ and ‘interdisciplinary’ language of the capability approach to bridge between different ideologies and interests. So it is most likely would not exclude certain social groups or miss certain aspects of life, as it is in the case of other theories. Sen emphasizes the importance of clarity when communicating and discussing our suggestions and thoughts about the type of society that we advocate for, which may result in *public engagement*. Public engagement can, then, be converted into public reasoning and public discussion, which opens the way for the selection and weighting process of different capabilities.

In other words, people will be engaged when they understand. And they will understand when politicians, academics, activists, journalists, and everyone really interested in social change and justice are clear enough about their ideas and proposals for a better society. Such clarity could be interpreted through their writings, podcasting, lectures, talks, speeches, and

²² However, this does not require that all Capability approach pioneers, share the same view. Martha Nussbaum, for example advocates the creation of a list of a central human capabilities that can be globally adapted. She actually presents her own list of such capabilities in her work: “Capabilities as Fundamental Entitlements: Sen and Social Justice,” introduced in the *Feminist Economics Journal*, Volume 9, Issue 2-3, 2003. Moreover, the capability approach literature is quite full of related debate over the selection and creation process of basic list of capabilities.

so on and so forth. Those efforts would probably raise awareness about many problematic issues, and only then public reasoning would lead to the most suitable list of *constitutional capabilities*. In this light, Sen invites us to explore a new aspect of democracy that is *measurement by discussion*. This concept shows, as Sen suggests, certain proximity to John Stuart Mill's conception of democracy as 'government by discussion'.

Still, talking and discussing remain a difficult task for many, not to mention bringing on public engagement. Thus, many of already engaged people –of which I have mentioned some categories above-, will tend to the lazy option of accepting a preset of weights for the quality of life (David McRaney, 2012)²³, such as national index, GDP, etc. For this particular reason, I also count on the broadness and diplomacy of the capability approach to promoting my thesis further in the future.

Moreover, the decision-makers in this particular society -namely the State- can decide upon this 'observation' process. If it is going to be produced at certain stages in people's lives, i.e., its citizens, or to broader its limits to include their whole lifetime phases, from childhood till elderliness. Consequently, if the former case occurs, then a set of 'functionings' should be generated, not capabilities (Ingrid Robeyns, 2003).²⁴

²³ Sen mentioned this in one of his interviews, but it was actually "scientifically approved", that people are lazy by nature and tend to accept presets of life routines more than willing to accept any "radical" changes in their lives, simply they do not like to "reason". Moreover, only smart humans can adjust and control this "lazy nature"; if that to result into their own benefit (well-being). See: "You are not so smart" by David McRaney, 2012

²⁴ Functionings are actual human beings and doings; as being healthy, being happy while Capabilities are the alternative combinations of functionings a person is feasibly able to achieve. "Sen's capability approach and gender inequality: selecting relevant capabilities". by Ingrid Robeyns, 2003

In Palestine, we face a very critical situation where people are subject to life loss at any moment regardless of age, place of residence, or any other applied criteria but being a Palestinian citizen²⁵. Thus, there is a need for an aggregated set of ‘functionings’ for Palestine, which is the primary orientation of this thesis.

Ultimately, it is a comparison process between advantages and disadvantages that people may have to learn more about their capabilities altogether and not only to focus on a certain ‘disadvantage,’ or status of ‘deprivation’ that they might suffer from. In the case of Palestine, we need to look at the whole picture to see the overall capabilities of Palestinians. Hence, Palestinians ought to be seen in all of their real ‘beings’ and ‘doings’ and not only as occupied (unfree) people. Although as mentioned earlier, this particular status merits grabbing a lot of interest and effort, this thesis argues that it should not be the only exclusive focus while examining the well-being of Palestinians, especially with a gender perspective. The view of the Capability approach, within its informational attributes, makes us recognize our duties in the society, and not only our unrealized rights.

1.10 WELL-BEING OF PALESTINIANS THROUGH THE CAPABILITY APPROACH

In his Capability Approach, Sen presents a new method for evaluating well-being by emphasizing individuals’ freedom to achieve the kind of lives they have reason to value. Thus the role of well-being states is the expansion of this freedom. This well-being freedom will be translated into citizens’ capabilities to form their different statuses of beings and

²⁵ This vulnerable state could differ however, from a certain social group to another; due to other reasons and complications, that I will discuss more in details in next chapter, while discussing the subject of **Capabilities for Palestine: focus on access to resources; women health and work.**

doings, i.e., a good and valuable life. The expansion of freedom can be achieved when the well-being state adopts a set of functionings, which in turn, will allow them -the citizens- from practicing this kind of life that they aspire.

This new view of well-being will indeed enhance its status, as a guide to policymaking, the status that it stipulated by many welfare economists. Moreover, this does not obscure the huge contrast between the two views of well-being: the one of capability approach, and the second view of welfare economics theories, concretely the “Utilitarianism that for so long was considered as ‘the official theory’ of welfare economics” (Sen, 2009, p. 272).

As a matter of fact, Sen uses this same argument against utilitarianism, which considers being happy as “the proper or ultimate end of all our actions” (Gay quoted in Schneewind, 2003, p. 408) and the only important criterion for evaluating the quality of life. Sen counters that while being happy is an important functioning, since it affects one’s well-being, yet the status of being happy or unhappy can be derived from “sources within one’s own life,” such as being ill, or it may arise from sources outside it, such as the pain that comes from “sympathizing with others’ misery” (Sen, 2003, p. 37).

In assessing a standard of living it is better to exclude the latter case from the assessment process, as it is more related to “the lives of others, rather than one’s own” (Sen, 2003, p. 38). In his work, Sen outlines the need to address directly the issue of measuring the quality of life acknowledging the difficulties of doing so, but without using misleading shortcuts.

Measuring the quality of life is not an easy task, not only because it can be confused with income, but also because people tend to confuse it with happiness, as illustrated previously.

According to Sen (2011), happiness is not more than any other economic prosperity measure, such as income but it is also not the only measure for the quality of life; neither is income. He argues that the freedom to lead a good life and having a good living standard is the right way to understand the quality of life, which is a thing that his capability approach strives to prove. ‘Happiness’ in this sense should not replace our fundamental human objectives, such as freedom, justice, and sustainable development, issues that are well covered in the capability approach, which cares about the multidimensional aspects of human progress and well-being. By this it opposes the utility approach that cares about the *final status* that a person ends with, i.e. being happy, while the capability approach cares more about the *process* which that person undertakes and commit herself to, in order to get there. Hence, the capability approach adopts both, objective and subjective well-being aspects to assess quality of life, i.e. multidimensional criteria for measuring well-being, not a single criterion, as in happiness (Frances Stewart, 2013; 2014).

Welfare economics led by utilitarians consider *happiness* as the ultimate measure for human well-being. Thus it is their primary tool in social evaluation and the making of public policy. On the other hand, Sen gives no concentric significance for it, i.e., being happy, in assessing people’s well-being more than any other human functioning.

Nevertheless, Sen insists, that the capability of being happy has its own importance but among many other human capabilities, to help a human to lead the kind of life she values and enhances her quality of life (Sen, 2009, p. 276).

Sen, justifiably, argues that happiness is not an accurate indicator of one's well-being or the only standard of life we have reason to value. He uses the example of deprived people and their adaptive preferences. Since disadvantaged people, who are desperate to have any profound change to their deprived status, are most likely to adopt inferior preferences to what they think is more feasible, or in other words, adjust their needs and desires according to this hopeless and deprived situation. Consequently, they will be able to generate a fake status of happiness. Thus the observation of their happiness as an indicator of their well-being is a misleading assessment (Frances Stewart, 2014).

Hence, well-being is not only about happiness but also about the quality of life, which means giving people a real opportunity to enjoy such a status of happiness, i.e., enjoy the capability of being happy. In Bhutan, a landlocked country in South Asia located at the eastern end of the Himalayas, they produce a Gross National Happiness measure as an alternative to Gross National Product. It's prime minister, Tshering Tobgay says: "Rather than talking about happiness, we want to work on reducing the obstacles to happiness".²⁶

²⁶ A recent change to this measure has been provided by Bhutan as well.

Capabilities capture not only achievements, but also unseen or unchosen alternatives; thus it ensures that people do not turn into adaptive preferences, which is why well-being in the capability approach presented as freedom rather than achievement. An illustrative example of this is that a well-being state that presents the freedom aspect of well-being would care more about securing the nutrition needs of its people so that they do not suffer from hunger and starvation, rather than banning fasting and hunger strikes. Thus people will enjoy the freedom to be well-nourished but also will have the freedom to achieve it or not, according to their own ranking of different beings and doings they have available. In another aspect of capability approach and well-being emerges the concept of satisfaction, as the internal, nonmaterial status of human well-being, something we -humans- were able to develop as intelligent species. This particular view of well-being, gives the capability approach an advantage over other economic theories as it can recognize the material aspects of human well-being as much as the non-material ones.

However, if one takes only the satisfaction that people demonstrate about the different dimensions of their well-being arise the problem of adaptive preferences again. For instance, the status of gratefulness that generally religious people or people of ideological faith, in general, adopt, as a response to any deprivation situation they may face in their lifetime, by considering it as a justified test of their faith. Or in the case of theists, to consider deprivation as proof that they are distant from God, and thus they had to take this deprivation journey to feel this claimed distance and get closer to god. Fasting Ramadan, and starving oneself from sunrise till sunset is a prominent example of this, or more obviously, the belief of ‘afterlife’ and ‘paradise’.

Moreover, many may argue that the state of well-being in ‘emergency’ areas where probably citizens are more likely subject to such adaptive preferences which accordingly, will affect the direction of public policies to more basic needs of its citizens such as food, shelter, basic health and so on. I will have more to say about this particular claim and to discuss more in details the case of Palestinians as ‘adaptive preferences’ in next chapters, by arguing mainly that this is not the only case, especially in areas of continuous conflict, and not warzones, such as in Palestine.

1.11 FINAL NOTES ON THIS RESEARCH PROJECT

Maintaining the well-being of people in prolonged conflict regions such as in Palestine has turned out to be a significant challenge. Despite the importance of the issue, only in few cases, it has been addressed in academic research (LPHA, 2014-2016 & Barber and McNeely, 2012), which is a matter of concern for me, not only as a citizen of this historically deprived country but also as a researcher and a feminist. By holding these two positions, my research seeks to fill this gap in knowledge on what securing sustainable development and improving quality of life in Palestinian territories really entails, and what opportunities Palestinians have actually in the country, by examining the well-being and quality of life of people in Palestine from a gender perspective, through applying the capability approach. The present research is therefore intended to make contributions to the literature on well-being and quality of life in Palestine, the application of the capability approach in empirical research, and studies on gender inequalities in Palestine.

The gender perspective looks at the influences of belonging to a specific gender or another, on one’s opportunities and ascribed social roles. Thus, analyzing public policy design and

implementation with a gender perspective is relevant here, because it helps us examine the impact public policy has on women and men in society, and how their different social roles were created.

Researching from a feminist perspective aims at not only to the construction of new knowledge but also to the production of social change, and to inform on the multiple forms of oppression that women face in society. While acknowledging that my research was conducted in a patriarchal society and study institutions that are still patriarchal, I ought to produce research that is established on feminist perspective and values. To give a platform for women's voices, including myself, to be listen, and bring attention to the different ways they contribute to maintaining the society and its well-being.

In the case of studying the well-being state in Palestine, there is a need for rational arguments and rooted scrutiny. As previously I pointed out, the idea of justice that Sen, suggests that scrutiny and reasoning in the search for justice were fundamentals. But in his approach, he was not arguing that this would lead to the abolition of all forms of conflicting interests and inequalities. A perfect just society as such does not exist, but a comparatively just society could be realized by aggregating information about interpersonal comparisons of well-being and relative advantages of its citizens, and paving the way for public reasoning.

As such, the concept of justice will be more connected to the agreement between different members of a given society, on the form of institutions and policies that will secure their needs, while not compromising their views or values. In fact, these institutions and procedures will help create this space for public discussion.

Hence, justice will be seen from a realization-focused approach derived from actual people's lives and behavior rather than a pre-set arrangement of overpowering institutions, or top-down approach to decision making without consulting the local population. This new scope of justice that is based on people's actual lives has paved the way for a lot of important applications on the assessment of people's freedoms, rights, and well-being, among which lies Sen's most influential work: *The Capability Approach*.

In my thesis, I argue that this approach can help produce the needed shift in priorities and policies in Palestine, in addition to helping us uncover the latent reasons for the ongoing unjust situation away from any political implications of being an occupied country, thus to ensure equitable, effective services and sustainable well-being in the territories, by benefiting from the very limited resources that are still under the Palestinian Authority control. As such, the *Capability Approach* is the theoretical and normative framework in this research, alongside a selection of methodological tools and practices developed in feminist studies to assess the gender impact of public policies and public budget based on the capability approach. This innovative framework is called: *Well Being Gender Budgets (WBGB)* and was pioneered in Italy by Tindara Addabbo, Diego Lanzi, and Antonella Picchio (Addabbo, 2011).

DESCRIPTION OF THE RESEARCH PROJECT

My research project suggests an analytical view of policies and implementation plans through the *Capability approach*, in search of well-being evidence and impact on people's quality of life. In other words, the research aims to propose to a particular community, the Palestinians

in this case, a way to better manage the society's resources, while reducing inequality and producing equal opportunities without discrimination against any group of citizens.

In the dominant economic perspective, where converting resources to 'goods and services' and dividing them equally between citizens is considered well-being, the gender inequality problem is reduced to secondary issues such as: having limited political power and voting rights, fighting gender violence, better health and education, without developing a radical solution to gender inequality problem. I believe that a free society cannot be achieved unless women and men are treated equally. The aim then is to obtain equal rights for both men and women by creating a well-being system based on gender budgeting. Thus, women are encouraged to achieve equality with men in terms of their participation in society and the workplace, their use of public space, their responsibilities, their positions of power, and so on. The Capability approach provides us with the needed analytical tools that help generate policies that respond to these objectives and their assessment process, as we study and compare issues such as people's capabilities, the quality of their lives and what are their real states of beings and doings, and not just the means to achieve them such as, commodities and income.

People are the nucleus component of society, and their participation in the construction of policies and their implementation plans is the correct measurement of progress made by sustainable development processes. In order to promote and enable people's desired engagement, a serious review of the capabilities of the Palestinian community and its potentials, alongside the assessment of the current mechanisms for setting strategies, and

policies, are needed. However, this assessment process is interdisciplinary and beyond the capacity of one research. Therefore, I decided to produce a thesis based on interrelated themes in three separate chapters, which tackle one or more of these issues. Each one of these chapters, I will look for well-being gender indicators that advance the assessment process of certain capabilities, chosen upon their importance to the context. In particular, the themes addressed in the three chapters will include one or more of these subjects: Health, Employment, and Care of oneself and others.

The first chapter develops a conceptual and heuristic framework that creates an understanding of the well-being of people in the Palestinian context, with a particular focus on gender equality and people's capabilities.

The second chapter reviews and analyzes the application of the Capability approach to gender auditing, i.e., WBGB methodological tools, to apply it to the Palestinian context. This theme focuses on Palestinian women's capability of access to resources (capability of work). Studying the capability of work will reveal a lot of gender inequalities, hidden in the private and public spheres within the Palestinian context. That is key to assessing women's participation in the labour force, and the different opportunities they have to equal income and employment, in comparison to those available for men. Secondary data sources is used in this chapter, to collect valuable information about people's achieved *functionings* (actual states of beings and doings), and how they are living currently, which enables sorting out relative indicators and reflecting on the quality of life, they are leading. To achieve this objective, I used recent statistical studies and reports on public spending, gender, and

employment in Palestine, conducted by The Palestinian Central Bureau of Statistics (PCBS) and The Palestinian initiative for the promotion of global dialogue and democracy (MIFTAH), in addition to reviewing the Palestinian public budget chapter dedicated to The Ministry of labour in Palestine (MOL) and The labour legislation in the country.

The third chapter is concerned with the empirical part of my research, by examining Palestinian Women's Unpaid Care work through the Capability Approach, in which I analyze the arguments based on primary data collected in fieldwork.

In this chapter, I argue that when we aim at analyzing the budgetary programs, it must be detected if their implementation conceals any invisible unpaid work, as well as assessment for the impact on the time available for women and men to enhance their well-being and quality of life. This issue is important because sometimes it can disrupt caregivers' life until the withdrawal from the labour market temporarily or permanently with consequent economic loss and personal income loss, and inefficiency at the macroeconomic level.

Moreover, the chapter concludes that there is the possibility that budgetary programs may cover unpaid work, be it invisible labour or unpaid care work, in its implementation. When this happens, people should be advised to determine the indicators to know its effect on their different capabilities and quality of life.

JUSTIFICATION FOR THE SELECTION OF CHAPTERS THEMES

The Capability Approach defines 'well-being' as referring to the 'quality of life' or in other words, living a 'good life' and thus, the state of well-being should not be limited to a package

of goods and services only, as the dominant economic perspective considers it to be, instead, it should include the freedoms and capabilities of people, which in turn enable them to undertake different ‘doings’ and practice different statuses of ‘beings’ such as: being healthy and being literate and to do some traveling and to care for oneself or others, for example.

When we analyze a public budget and go away from the numbers towards real humans (women and men) to whom these budgets are directed, we find a lot of social differences in access to public resources. This issue is crucial but is usually marginalized in public policies, and the public budget in particular. My research suggests new approaches to developing public policy and public budgeting that may help in reducing these inequalities. The numbers in the budget can give us an idea about the government priorities for the public policies and what it leaves at the margin. They give us ‘keys’ to understanding public activity and help us in the policy analysis. The public budget is not only an accounting document, but it reflects the outcome of a budgetary cycle. As in any other research with a feminist perspective, this research will examine if women’s voices are listened to, within the public space and, thus, observe if they participate in this budgetary cycle. Hence, this work considers the gender budget as one of the best practices of participatory budgets and examines if its employment will result in the advancement of a well-being system in Palestine, through a budget assessment of the Palestinian Ministry of Labour (second chapter).

Equally important, studying the implications of women’s unpaid care work on the well-being of other members in the society, which has mutual effects on public budgets setting and delivered public services (Elson, 1998). These issues were deeply discussed in the assessment of public policies with a gender perspective, i.e., gender budgeting which foreseen to help overcome these inequalities. Furthermore, these applications and efforts are believed to

produce a long-lasting positive impact when seen in the capability approach to gender auditing (Addabbo, 2011). Hence, the fourth chapter will be dedicated to conceptualizing the issue of unpaid care work in Palestine and make its effects on women's capabilities visible by using empirical data found in fieldwork.

RESEARCH METHODOLOGY

With its feminist perspective and complicated settings, this research had to adapt an advocacy, participatory, and change-oriented qualitative approach, for designing the methodology leading its fieldwork. When taking the advocacy / participatory position, I declare that in this project, I am not only in the search for answers to my research inquiries, but also seeking change, and enhancement in the well-being of fieldwork participants, considering them among the most marginalized groups in my community. I am attempting to understand new ways to improve the quality of life of people in my country, and the positive advancement of the shared space we live in together, while calling for reforming its institutions, hence, I am seeking to change and enhance my own life and well-being as well (Creswell, 1994).

In the application of the capability approach in WBGB, we seek to answer questions related to human beings in their private and public spaces, to assess their quality of life and well-being status. Adding to the fact, that people we are studying in this research, are manifesting different complex identities, the majority of them are historically marginalized, and their voices rarely were counted for or listened to, especially in the public policy sphere. This requires then a shift in focus, from traditional constructive measurement and evaluation

methods for studying people's lives, which only recognizes the means of living in numeric shape and statistically aggregated fusion, to an evaluation that looks at what intrinsically matters, that is, the real freedoms people have, and the constraints that prevent them from living the kind of life they wish for, i.e., measuring their opportunities and capabilities of enjoying different states of beings and doings, such as: being able to express one's own opinion, moving freely in territories, enjoying a disease-free healthy life. Hence, we are seeking new methodologies for assessing and accessing unquantifiable facts about those people we are interested in observing and understanding. That said, qualitative approaches seem to be the best adequate methods to provide such means, as qualitative techniques allow researchers to share in the understandings and perceptions of others and to explore how people structure and give meaning to their daily lives (Berg, 1989).

While designing this study methodology, research techniques, and data collection instruments, all of the above-mentioned issues and concerns were taken into consideration. Thus, this study used some of the most effective qualitative research data collection techniques that allow for collecting open-ended emerging information in the field (Creswell, 1994; Berg, 1989). Namely, this research used the following instruments for collecting its empirical data: open-ended interviews, online informational survey, focus groups and one-to-one discussions, semi-structured interviews, and ethnographic records of fieldwork observations of people behaviors by participating in their activities.

According to Merriam (2002), the utility of using an interpretative qualitative approach in the study is in enabling social researchers to learn how individuals experience and interact with their social world. Interpretative understanding will be built up through the use of flexible

qualitative methodology, phenomenology, and ethnography, i.e., using different qualitative research tools such as those designed by the research.

Qualitative research allows in-depth exploration of the lived experiences of Palestinian people and provides a profound understanding of the ways and means they employ to maintain their well-being. It offers contextual descriptions of individuals and profound explanations of aspects of (living a good life) strategies of the Palestinian people.

Given that a significant discussion in advancing the Capability approach is how to put it into practice, to inform public policies and state reforms, and what the best methodologies are required to implement it. As such, methodologies cannot be separated from my own analysis, and therefore, it will be discussed at large in each chapter detailing their relation to the Capability approach as well as its limitations and the opportunities they open for its implementation within the Palestinian context.

FURTHER ON METHODOLOGY, RESEARCH QUESTION, AND OBJECTIVES

In the capability approach literature, a lot of debates have been emerged regarding what is the best methodology to follow in applying the approach in an empirical study (See: Emma Hollywood, Valerie Egdell, Ronald McQuaid, Dirk Michel-Schertges, 2012). These debates were mainly around the measurement of capabilities and if we have to measure them in the first place, or only to decide on them upon measuring the functionings. Sen, who himself

theorized the approach, did not display any suggestions in this direction, and never adopted a precise list of capabilities (Robeyns, 2003).

Measuring capabilities is a difficult task indeed when we reflect on the real meaning of them; that is the freedoms and opportunities people have, to create their actual beings and doings in life. Assessing the latter or in other words ‘functionings’, which represent real achievements of people, seems easier as indicators can be derived from people’s current settings; thus, functionings can be measured and observed. Nevertheless, the question that remains present is if they deliver the needed information we are seeking. With regards to this aspect, a shift in focus was necessary in this research toward a more innovative methodology, to benefit from the multidimensional aspects within the capability approach, in order to reach a set of measurements for the well-being, hand in hand with discussions on public budgets and policies impact, on different dimensions of well-being of people in the case under study.

In considering the complexity of the issue at stake, that is, approaching a new way to assess and implement a public budget and related policies in the context of an occupied country in attempt to enhance people’s well-being, I build upon the knowledge I gathered in the three different research workstations (Palestine, Spain, and Italy), and my local knowledge of the Palestinian social and political context. Further, I also benefit from Ingrid Robeyns methodology (2003) and her criteria for the selection process of capabilities relevant to a certain social context, Palestine in this case, as well as the Italian and Spanish frameworks for the measurement of well-being with a gender perspective.

Accordingly, research design and methodology aim to answer the following main research question:

How has the Palestinian public policy design and implementation contributed to shaping patterns of gender inequality in society and decreasing quality of life and well-being of different social groups, and reducing the capabilities of women in particular?

Once that task is completed, an examination of selected methodologies for the measurement of well-being in the capability approach was needed, to define those considered relevant to answer the following analytical research questions, expressly *how to translate this new knowledge into useful policy suggestions and recommendations? And how to identify potential alternatives and actions, to highlight what is considered important and yet feasible for the Palestinian people?*

Moreover, each chapter will include its specific sub-question/s derived from the above core one.

Following the proposed themes, the research objectives were narrowed to the following ones:

- To explore the construct of well-being in the Palestinian context based on the Capability approach.
- To review the peculiarities and tools to the application of gender budgeting in the capability approach; The Well Being Gender Budget.
- To conduct a study at the micro-level, in order to define indicators and implications on well-being to traditionally marginalized social groups, such as women.

As I have presented so far in this thesis, the capability approach provides a tremendous framework to tackle some of the world's most controversial issues, such as inequality in gender, well-being in developing environments, sustainable development, and social justice among many others. It is on those bases it was sought as a promising approach that can be applied and delivers benefit for the Palestinian case.

This research aims at putting a threshold of a well-being system in Palestine with a gender perspective, paving the way for the best method and procedure, to approach a true well-being for all and each Palestinian that is to live a meaningful and good life, a life that is full of aspirations and satisfaction. Henceforth, it is essential to define the most compatible methodologies of applying the capability approach in this direction that is the enhancement of the quality of life and well-being of deprived people. To this end, my applied methodology in this research was adopted from those I consider more relevant to the above-mentioned criteria. I chose the Well Being Gender Budget, as well as re-examining the actual gender budgeting exercises in Palestine, in addition to Ingrid Robeyns methodology (Robeyns, 2003), that offers a normative evaluation framework of well-being, in assessing gender inequality through the capability approach.

On the other hand, the Spanish methodology, or rather, the Guide provided by the Woman's Institute for the application of the capability approach to perform gender auditing of public budgets (Paloma De Villota, 2007), was selected for directing the research second stage, by endorsing some aspects of this methodology that I consider relevant to my case study, which in turn were later modified and applied through the research to fit the Palestinian context.

Moreover, the unpaid work and invisible care-work in public and private spheres, are some of the critical aspects when measuring deprivation and inequalities between people through the WBGB, thus in order to study and examine these particular aspects in the Palestinian context, the application of qualitative research tools was needed. Respectively, chapter number four is dedicated to a comprehensive discussion on the qualitative research conducted in the thesis to reach this objective.

CHAPTER TWO: FROM THEORY TO PRACTICE

2.1 INTRODUCTION

Amartya Sen has introduced a new concept to the human development framework, the Capability approach - an approach that is interested in human capabilities and functionings (i.e. what people are actually able to do and be in real life), in hopes of shifting the attention of policy-makers from a concentration on economic well-being to a focus on human well-being. The Capability approach is at the core of this research, and in this chapter, I will review the most relevant literature and its most recent applications and tools for the measurement of well-being through a gender perspective, and how I see it could be operational for the Palestinian case.

In this chapter I introduce the possible application of the Capability Approach as a new normative framework for the measurement of well-being and human development, through the review of the approach and its criticism, the concept of selecting precise dimensions or a list of capabilities, mainly reviewing Martha Nussbaum's chosen list.

2.2 FROM AN APPROACH BASED ON THE MONETARY DIMENSION TO AN EXTENDED EVALUATION OF WELL-BEING (CAPABILITIES AND FUNCTIONINGS)

The question of *how to determine to what extent people are leading a life of good quality* has grabbed the attention of philosophers, sociologists, economists and all those who are concerned in studying and examining human life throughout history. So much so that very often their work has been devoted to defining *what are the aspects of this “good life” and how can people be able to develop them*. The ‘Quality of Life’ Conference that took place at the WIDER Institute in Helsinki on July 1988, organized by Martha Nussbaum and Amartya Sen, addressed mainly these questions: if it was the solid number of income per capita, or it was instead maximizing the total sum of individual’s utility the right measures to assess human quality of life. The debate was vivid between scholars from different disciplines. The conference’s core purpose was to bring out into the open the question of how to measure quality of life and whether it could be reduced to a simple figure while examining the drawbacks and limitations of different perspectives, to result in applicable measures in the policymaking process.

During the conference, Sen presented his Capability Approach, a new recipe to measure quality of life and well-being. The capability approach offered substitute criteria for what has traditionally been conceived as the primary measurements for assessing quality of life in many regions and countries: incomes, utilities, resources, and primary goods. Sen strongly believed such measures were unable to gather all the complexity of one’s particular sense of what quality of life is. Thus, he treated to create a flexible approach that could incorporate specific requirements, as well as the social structure to fulfill individual and collective needs

and wishes. During the conference, Sen himself faced criticism of his approach, mainly from G. A. Cohen, who questioned whether the capability approach and its aspect of freedom could be indeed considered as a true answer to all raised questions.

Cohen argued that Sen's proposal was ambiguous and too general to capture all that lays in the space between basic goods and utility, or other words, what enables a person to benefit from basic goods to reach utility, with or without having the capability to do so. Cohen called this space: a midfare, as he explained a midfare was "constituted of states of the person produced by goods, states in virtue of which utility levels take the values they do. It is "posterior" to "having goods" and "prior" to "having utility." (Cohen, 1993, p. 18).

In his critique, Cohen admitted that there was a need to look further beyond of goods or utilities to inform public policy, and to look into what a person can achieve from these resources, and not to focus only on her actual status, as the capability approach also suggests. However, he believed that the capability approach did not propose a full evaluation of a person's advantage or disadvantage, as it only examined the bundle of resources she has or assessing the level of utility she reached, as it always required an active choice of a fully enabled person (Cohen, 1990). Hence, a person needs functioning or activating her capabilities to achieve the well-being status she aspires. In this argument, I believe Cohen definitely misinterpreted Sen's approach. In his essay "Capabilities and well-being" Sen explained: "A person's ability to achieve various valuable functionings may be greatly enhanced by public action and policy, and these expansions of capability are not unimportant for freedom for that reason" (Sen, 1993, p. 44). In this sense, the capability approach insists that one can actually achieve some of her valuable functionings, not only by what kind of

activities and choices she makes, but also that might be influenced by the actions and choices of others living with her in a shared societal context, and how this affects her own choices. Thus, the capability approach is not limited by the active choices or actions of a person only, as Cohen suggested. In fact, the capability approach goes beyond that idea, to include a broader spectrum of freedom for individuals with different abilities, tastes, and preferences. This is precisely what makes the capability approach operational in my opinion, and what makes it fit within different frameworks and spaces in evaluating the quality of life and state of well-being in our societies, especially in complicated contexts such as in Palestine.

2.3 DISPUTES ON THE CAPABILITY APPROACH

Sen presented the capability approach as “a broad normative framework for the evaluation and assessment of individual well-being, but also as an interdisciplinary multidimensional framework, that can be used for the assessment of social arrangements, the design of policies, and proposals about social change in society.” (Robeyns, 2005, p.94). In recent years, the approach was developed by many other scholars who took it further, either theorizing the approach, or suggesting its application to fit one or more of the above-mentioned domains. The journey of developing the approach, however, was not empty of disputes. In fact, many scholars were hesitant in accepting Sen’s proposal and doubted the issues it claims to address (Robert Sugden, 1993, Gore, 1997; Stewart, 2002; Hill, 2003; among others), if not rejecting them all together (Cohen, 1993; Thomas, Koggel, 2003; Pogge, 2010; among others).

In general, main criticisms against the capability approach can be summarized in one or more of the following areas, to which I will try to respond separately: the individualism of the approach (Gore, 1997; Evans, 2002; Stewart, 2005); its evaluative space, and its possibilities of operationalization (Sugden, 1993; Roemer, 1996).

2.3.1 INDIVIDUALISM VS. COLLECTIVISM IN THE CAPABILITY APPROACH

The capability approach was criticized by some scholars for being too individualistic (Gore, 1997; Evans, 2002; Stewart, 2005), and that it does not take into consideration sufficiently relational contexts, collectives, institutions, and social structures. While responding specifically to this critique, I also hope to open a discussion that allow me to respond as well to some of the other criticism, in a more constructive fashion.

In its theoretical terms, the Capability Approach treats the individual as an end in herself, and her capabilities as the focal point for the evaluation of well-being. What the approach pretends to do is putting the individual at the center of our moral concern. To give each and all individuals the adequate and healthy space for their unique voices and selves. Without compromising any identity they may hold or any aspect of the different ways they define themselves with. Hence, again it is proclaiming that the individual's life belongs to her and that she has an inalienable right to live it as she wishes, to choose the values and quality of life she aspires. The Capability Approach is doing that while constantly recognizing that the individual, and especially historically oppressed ones, cannot be totally detached from their

social structure, that sometimes violates her agency, and claims she must sacrifice her values and goals for the group's greater good.

If we apply this to the Palestinian context, we can clearly see how all identities other than the Palestinian one, seems to be perceived as a threat to the common struggle against the occupation. It is converted to a collective identity that is constructed against all other possible identities or attachments that the Palestinian individual may hold. Taking notion of this ethical dilemma, does not necessarily means the abolition of the influence of society on constructing our other identities, and our positions within the society itself. In fact, the capabilities we seek to define and promote are by no means exclusively based on the self-sufficient individual subject. For example, Nussbaum's list of central human functional capabilities includes 'affiliation', which encompasses 'being able to live with and towards others' (2000b, p. 79).

The very legitimate concern however, is with the integrity of the individual in the context of her relationships. In this sense, it could be argued that Sen's approach is indeed "ethically" but not methodologically individualistic (Robeyns, 2005). From the perspective of the feminist ethic of care the question we seek to answer is 'How can I achieve some freedom, yet remain connected?' (Nancy Hirschmann, 1997, p. 170). To be capable of 'compassion' for the situation of another person, or to care for them implies disconnection as a starting point, not a substantive connection. The person and 'the other' interact in a metaphorical 'space of capabilities'. So while the capability approach put emphasis on the freedom for people to make decisions regarding their own lives, the care framework add to that the legitimate questions of why and in what context people make such a decision (Eva F. Kittay, 2009).

The Capability Approach believes in human diversity and different dimensions to one's personality. It does not treat individuals within the same group, family, or social category as identical or homogeneous, but rather encourages scrutiny that guarantees the exploration of these differences in a safe, positive and nurturing environment. In fact, it takes into account these differences in the evaluation of well-being and quality of life, as well as taking account of how they lead to different experiences, and thus different effects from the societal or contextual spaces, where the individuals live and practice their activities. The capability approach talks explicitly about the factors and constraints that influence the decisions and choices a person makes, and that may help her (or not) in converting resources into good living, or better into capabilities and opportunities that enhance her life. Sen agrees that “no individual can think, choose, or act without being influenced [...] by the nature and working of the society around him or her” (Sen, 2002, pp.80–84) while arguing at the same time that “different people can have quite different opportunities for converting income and other primary goods into characteristics of good living and into the kind of freedom valued in human life” (Sen, 2009, p.254).

Hence, it could be argue that it is difficult to equate the individualism held by this perspective to other individualistic positions that considers individuals alone, without any reference to context as the main source of agency. These types of critiques seem to, somehow, misinterpret the nature of individualism in the approach (Stewart, 2002).

Moreover, the Capability Approach actually recognizes the influence of social structure, the differences of relational perspectives, and institutions on the above mentioned conversion process, as it acknowledges that those processes are not only dependent on personal characteristics and differences, but also is usually influenced, according to Sen, by different

sets of interrelated factors, which can be found in the life settings surrounding people, be it social, natural or environmental (See: Sen, 1999 & 2009). And thus, it captures people's capabilities within a particular snap of time of their lives, which are influenced by circumstances that created them. Hence, theoretically distinguishing functionings from capabilities. (Robeyns, 2005).

On this, Sen says: "the word 'social' in the expression 'social opportunity' (...) is a useful reminder not to view individuals and their opportunities in isolated terms. The options that a person has depended greatly on relations with others and on what the state and other institutions do. We shall be particularly concerned with those opportunities that are strongly influenced by social circumstances and public policy" (Dre`ze and Sen, 2002, p.6).

For example, let us take the subject of equality and intrahouse distribution of resources, it is a matter of concern for many feminist studies how gender inequality manifests itself inside the household space, in the form of unequal division of labour and inequality in the distribution of resources²⁷. Many families reproduce gender bias in daily life inside the household, by giving preference and superiority to sons over daughters. If we do not interpret the well-being in terms of individual capabilities within this context, we will not be able to assess and address the gender inequality problem inside the household. If the individual with all her complexities and identities, was not the moral focal point, the society could agree on procedures and distribution that can harm a group of people and even certain individuals inside more limited spaces as the family house.

²⁷ This will be discussed further in next two chapters

For this we need a new way of thinking and judgment, like the one presented in the capability approach, that enable individuals to be what they want, and do what they want in order to enhance their quality of life, without being ashamed, stigmatized, or punished by the collectives surrounding them, be them families, tribes, religious groups, or society at large.

The capability approach invites us to assess a new evaluative space of well-being but also to address its determinants, which, according to Thomas Pogge (2010), can be listed as follows:

(1) **The household space and distribution of resources:** “intrafamily distribution of incomes is quite a crucial parametric variable in linking individual achievements and opportunities with the overall level of family income.” (Sen, 2011, p.71).

2) **Differences in relational perspectives (Community, neighborhoods, and groups):** “The commodity requirements of established patterns of behavior may vary between communities, depending on conventions and customs.” (Sen quoted in Pogge, 2010, p.5).

(3) **Variations in socio-political climate:** “The conversion of personal incomes and resources into the quality of life is also influenced by social conditions, including public educational arrangements, and the prevalence or absence of crime and violence (...) the nature of community relationships. (Sen, 2000, p. 70f).

(4) **Environmental diversities:** “Variations in environmental conditions (...) can influence what a person gets out of a given level of income. Heating and clothing requirements of the

poor in colder climates cause problems that may not be shared by equally poor people in warmer lands.” Sen, 2000, p.70).

(5) Personal heterogeneities and different identities: “People have disparate physical characteristics connected with disability, illness, age or gender, and these make their needs diverse.” Sen, 2000, p.P70).

As such, the Capability Approach considers all of the above determinants of the “means” for creating the capabilities and advancing the quality of life, rather than ends *per se*. It is true that they are influential to the process of creating one’s choices and thus opportunities, but not on the person’s capabilities directly, and a plausible evaluative exercise for the well-being, should not consider them more than such, as they are never fixed parameters, but rather change with time and place, and should always be analyzed within their specific historical and geographical terms.

2.3.2 THE EVALUATIVE SPACE IN THE CAPABILITY APPROACH

Another fundamental critique of the capability approach is that Sen’s did not provide a specific list of capabilities or a guide for the selection process. It is true that proposing a specific list of capabilities and determining a roadmap for the selection exercise, would make the whole evaluation process for the capabilities easier. But, Sen always insisted on the value of choice and participation (Alkire, 2002), he never opted for shortcuts, when it has to do

with a just and inclusive evaluation of people's well-being, and their advantages and disadvantages in society.

In Sen's view, "for a particular person, who is making his or her own judgments, the selection of weights will require reflection, rather than any interpersonal agreement...in arriving at an 'agreed' range for social evaluation...there has to be some kind of reasoned 'consensus'" (Sen, 2011, p.78)

I also agree with Sen, that this reflection process should be practiced by individuals, and in particular, privileged ones. Usually, the state, social policies, and measures for equality focus on groups identified as vulnerable, and treat them as homogeneous, without questioning the privileges hidden in the construction of such collectives (Carmen Romero Bachiller, Marisela Montenegro, 2018). A better exercise for dismantling inequalities and deconstructing privilege is to start with oneself. To be conscious, and to acknowledge the privileges I hold, in order to understand its roots, in order to understand how my privilege helps (or not) maintaining systemic oppression against others in society, and how I can help in changing that. For a truly just and equal society, backed by a just system managed by a well-being state, the less privileged and deprived citizens, should not be reminded that they are 'different' the whole time when they go about their lives and practice their daily activities. And because we as humans are complex compositions of different identities, our experiences, and opinions of what a good life is, differ as well, even if we live in the same house. Even identical twins can have different perceptions of a good life or standard of living.

Hence, as a result of this diversity of human beings, it is almost impossible to reach absolute equality, and deciding on one evaluative space will definitely lead to some kind of inequality in other spaces and dimensions of well-being (Sugden, 1993).

Sen argues that the capability approach does not need to provide a weighting or selection system for valuable capabilities, as this is the work of the social state based on social arrangement and agreement. He discusses the impossibility of the ability of an outsider to identify what works for a certain society or context, or to decide on what is considered relative and valuable dimensions for people, without being unbiased or conducting a proper examination without the involvement of local experts. (Sen, 1992; Sugden, 1993)

In addition, the suggestion of one universal list of capabilities and equal distribution as the road to justice, implies that there is always a constant consent and harmony between people. Moreover, it suggests that resources are held and controlled by a group of people who will then ‘willingly’ distribute them among all society members ‘equally’. (Robenyns, 2005), which is rarely the case.

Another angle in refuting the evaluative space criticism against the capability approach is the idea of drifting the process of scrutiny, reasoning and making decisions on people’s well-being away from people themselves, while having an outsider who decides on what is good and what is bad, what is intrinsic and what is marginal. This suggestion treats citizens as passive entities in society, and limits their freedom of choice in shallow and incomplete processes, as in voting right, for example.

Sen refuses to endorse one universal list of capabilities for two reasons, according to Robeyns (2005): first, because of the multidimensionality of the approach the list could be used for different purposes, such as in development, examining gender inequality, or informing social and economic policies. Second, because the list is usually produced in a specific context, with specific cultural, political, and geographical conditions, that will influence the selection process, as I have previously discussed. Sen leaves it to public discussion, public reasoning, and to the democratic process, hence, to the people to decide on the weights and importance given to each capability. However, Sen never proposed how “these processes of public reasoning and democracy are going to take place, and how we can make sure that minimal conditions of fair representation are guaranteed.” (Stewart, 2002, p.64)

Stewart points out in her critique to the capability approach, that Sen’s suggestion that just and democratic institutions will undoubtedly emerge in the process of deciding a set of capabilities, that this is never the case, even in the most democratic and ‘free’ societies (Stewart, 2002). In view of this, I shall agree that the capability approach stands incomplete and need to be reexamined, or complemented by other theories, to be able to produce needed principles and procedures, that guarantee not only public discussion and reasoning, but also the democratic and just institutions that will allow them in the first place.

2.3.3 OPERATIONALITY OF THE CAPABILITY APPROACH

The critique on the possibilities for operationalizing Sen’s approach is connected to the above discussion, as Sen never provided information on the selection process nor endorsed a concrete list of capabilities. For many scholars, this limits the application of this approach.

In fact the capability approach had been applied by different studies and within various contexts, such as Nussbaum (2000, 2003a) studying the predicament of poor women in India (women and human development); Tindara Addabbo, Antonella Picchio, and Diego Lanzi (2011) analyzing well-being and gender budgets; Solava Ibarhim (2006) who used the concept of collective capabilities, in studying self-help initiatives among the poor in Egypt; or Sen himself by introducing the concept of basic capabilities, for the Human Development Index, among many others (UNDP 1990: 9). However, the capability approach, as theorized by Sen (1985), has never been presented as a fully comprehensive solution for all underlying issues in well-being. But instead, it proposes a multidimensional framework that can be used for the evaluative exercise of well-being. It gives us a new way of thinking about the quality of life while recognizing limits and constraints related to achieve it. Hence, and as I pointed out earlier, the capability approach needs to be complemented by other theories, in order to reach the full potential of its operationality. Or as some of the above-mentioned scholars did, should limit its evaluative space within an aggregated set of functionings, as in the case of this doctoral research.

In methodological terms, this requires the analysis of specific contexts, historically and geographically, to analyze the power dynamics, and roots of privilege, within a given society. To understand how it functions, and how its institutions have been created, something the capability approach acknowledges, but is not designed to deliver.

In summary, in response to his critics, Sen (1995) clarified terms such as '*capability*', which he chose to represent an approach to a person's well-being. He defines the capability as the "ability to do valuable acts or reach valuable states of being" (Sen, 1995, p.30). The

capabilities within this understanding are the alternative combinations of different ‘beings’ and ‘doings’ that a person can choose from, while on the other hand, Sen defines the actual achieved set of such beings and doings as ‘*functionings*’. Sen suggests that the evaluation of the quality of life that a person can lead should be assessed according to her ability to achieve valuable functionings. However, Sen (1995) makes no note of a specific set of valuable capabilities, i.e., functionings, which should be adopted universally, as he places emphasis on humans’ diversity, thus the diversity of their capabilities and peoples’ own rankings of those capabilities and how they evaluate them, according to value and importance.

Moreover, Sen (1995) also highlights the differences between developing and developed economies, with the context of the former demanding focus on a list of basic capabilities: as being well-nourished and well sheltered. In contrast, in the latter case Sen includes more complex states of beings and doings. However, Sen insists that the selection process of a certain list of valuable capabilities, within a certain societal context, should not produce any limitation or weakness in the overall framework of the Capability Approach (Sen, 1995).

2.4 COMPREHENDING THE CAPABILITY APPROACH AMONG OTHER ECONOMIC THEORIES

In his *Equality of what* (1979), Sen main thesis was to point out the inherent differences between human beings, which has resulted in the failure of both past and current economic theories to tackle the equality problem, as they fail to trackback and observe these differences in their original settings (Sen, 1979). Hence, he argued against the assumption of utilitarian

equality, where the only way to solve the pure 'distribution problem' is to have equated marginal utilities; thus everyone will have the same utility function, an assumption that he says contradicts with the above-mentioned differences between human beings (Sen, 1979). In other words, utilitarian perception of equality suggests that all people are equal in their needs and interests; i.e., their marginal utilities. Sen proved such thing as impossible, as human beings are not identical, nor are their interests and needs. What Sen was keen to show, is that maximizing the total sum of utilities, which is the main concern of utilitarianism, cannot necessarily produce equality whatsoever, as we are not dealing with identical human beings (Sen, 1979).

Sen also made a note of the concept of well-being under the framework of welfarism, which is considered the new enhanced form of classical utilitarianism that is conceived in terms of utilities only. In this sense, Sen's argument against welfarism was that a person's well-being should also be judged by other non-utility objective factors, such as 'being discriminated against', 'being thirsty' and so on. He called 'basic capabilities to these new non-utility aspects of a person's well-being. Consequently, Sen's definition of the new concept 'basic capability' was referred to the ability that each person has to do - or to be - specific things. Hence, his notion of a person's well-being within her capabilities context offered a remarkable response to the limitations of Rawlsian's concepts of primary goods and of welfarism's exclusive dependence on utility (Sen, 1979).

The position of the Capability Approach is that in evaluating people's life, it takes account of some human acts and states and considers them important even though they may not produce

or lead to any utility, which is the core thing in the utilitarian and welfarist evaluation in general; hence they care only of what produces or yields to a utility.

Moreover, Sen distinguishes between four different evaluative tools for the assessment of human advantages: (1) “*well-being achievement*”, (2) “*agency achievement*”, (3) “*well-being freedom*”, and (4) “*agency freedom*”, pointing out their interrelation but also apparent differences (Sen, 2011, p. 287). To reflect on the interrelation and differences between these four forms of a person’s advantage and their responsive evaluation exercise, let us think of the following example.

Take the case of a deprived person in a specific region. Now if one asks herself: *when does that status of deprivation call for urgent governmental intervention?* The answer under the capability approach context is when that deprived person’s well-being - not her agency – is being affected. If we think of a person who fasts from dawn to sunset for religious reasons, like Muslims do in Ramadan, and another who suffers from the same deprivation status due to lack of food and clean water, or have no access to resources, obviously, these two individuals situations differ widely. More specifically, the concept of well-being freedom is much more connected to public policy and government assistance than well-being achievement.

In the same example as above, the well-being state may have reason to offer a person adequate opportunities to overcome hunger, but not to insist that she must take up that offer and cease to be hungry or deprived, as in the case of the fasting person (Sen, 2003). The

distinction of the capability approach that Sen presents is that in assessing quality of life, one should take account of the standard of living of the life of the person being examined. If we assess a person's quality of life, from the perspective of well-being achievement or the agency achievement only, our assessment will not be comprehensive or complete, as these measures might be obscuring, some impersonal factors and objectives, to the person's own life, as the example above illustrates. Despite the acknowledgment of the capability approach of both, personal (social interaction order) and impersonal (social, institutional order) influence on person's capabilities and quality of life, it does not provide an explicit analysis on how to deal these effects, and it is on this basis, I insist it could be complemented by a feminist social theory that allows such analysis. A similar proximity is presented in this thesis, specifically, in chapter number four while discussing the subject of unpaid care work and the qualitative fieldwork result.

Sen admits the problem of public lack of clarity about the subject of quality of life, basically because no one ever has truly measured it, but the right thing to do in his opinion is to break this scientific deadlock about the necessity of having something 'measurable' to produce some empirical data. Instead, in assessing the quality of life, if you need to measure something you have better find a way to measure it, and dig deep to see it, which is an arduous and lengthy process, instead of going to the lazy choice of measuring something else instead.

This argument is related to what was mentioned earlier as the basic capabilities, as well as the relation of these basic capabilities, and the analysis of poverty. Income level in itself cannot provide a full representation of people's lives, while under the capability approach context, it

is more relevant to examine the ability of people to convert income into basic capabilities to be able to identify the poor in terms of capabilities. Hence, the income level will be seen as a means to enhance well-being, rather than a target by itself. A person can be above the income level deemed poverty, but still be considered as 'poor' in terms of her set of capabilities. (see: Sen, 2009 & 1981).

Income is a bad indicator of poverty level and quality of life in general. To emphasize the previous discussion, one can consider the case of physical disability. Commonly, relief programs only focus on the low-income level of households, and thus they try to compensate 'family' for that. But if there is a member with a physical disability in that household, the income level check, if one use it only to assess this family needs, would not take account of that family member disability status, and thus consequently it fails to offer relief his/her deprivation status, not as much it could do for other family members. I will summarize this household well-being problem in two points: 1) the family that has one or more family members with a disability requires other members to take care of him/her/ them; thus these caregivers need the additional capability of caring for others. 2) on the other hand, the family members with a disability may not have a problem in gaining income, but he or she could have a problem in converting this income into a good living due to her/his disability. In both cases, there is a major problem of deprivation that income check alone cannot detect.

2.5 BRINGING THEORY TO PRACTICE

Many scholars have tackled this issue of putting the capability approach into practice. They include but not limited to: Sabina Alkire in *The Capability Approach as a Development*

Paradigm (2003), and other works, Bénédicte Zimmermann in Pragmatism and the Capability Approach – Challenges in Social Theory and Empirical Research (2006); Ingrid Robeyns in many of her works, but specifically in her 2003 essay on selecting relevant capabilities: Sen's capability approach and gender inequality: selecting relevant capabilities among many others. It is important to note here that all researchers used their own interpretation of what is considered 'operational' in the capability approach, with no definite guidelines (Enrica Martinetti, 2009).

In a broader scene, and in consonance with the capability approach, while trying to achieve a common measurement of quality of life beyond macroeconomic figures, the United Nations Development Programme (UNDP) introduced the Human Development Index (HDI) in 1990. Annually since that date, it has been included in the Human Development Reports of UNDP. Until 2010, the HDI report included the following three dimensions of human development measures:

- *A long and healthy life: Life expectancy at birth*
- *Education Index: Mean years of schooling and Expected years of schooling*
- *A decent standard of living*

According to Martha Nussbaum (2011), this application of the capability approach has comparative characteristics only. Nussbaum acknowledges the importance of such an exercise, but points out how it offers a very limited version of the approach, given its standardized measurement and the limited number of items considered. Through this application of the capability approach, “nations are compared in areas such as health and educational attainment. But concerning what level of health service, or what level of

educational provision, a just society would deliver as a fundamental entitlement of all its citizens, the view is suggestive, but basically silent” (David Grusky, 2006, p. 50).

Obviously, the search for a comparative measure of well-being is not an easy task, even within the capability approach, and the above-mentioned dimensions of measuring human development still remain inadequate to deliver true comparative data between nations regarding their development in terms of their capabilities. However, I believe that if nations are to reap the fruits of what the capability approach is capable of, concern for finding true well-being measurements should be stressed internally. For a country to be able to benefit from the capability approach, a serious collaboration of different parties inside the country is needed. As such, the work of UNDP or any other external party will, and should, be complementary to these efforts, and not the basic reference, especially in the cases where international intervention in internal policies is the norm, as in the Palestinian case.

Health and education are also very important dimensions in Nussbaum’s thesis, which she was keen to develop alongside Sen’s approach. She brings in the gender perspective while discussing the capability approach as she argues that indeed the GNP per capita and utility fail to provide an adequate measure for human development and well-being, especially in terms of inequalities and, more specifically, gender equality (Nussbaum, 2001). As I have pointed out earlier in this chapter, such resources, and utilities based measures of well-being, give distorted and incomplete data, and fail to reflect how traditionally marginalized groups, such as women, are to achieve full equality in the different elements of well-being such as health, education, mobility, and political participation. Women frequently exhibit ‘adaptive

preferences': preferences that often cover up their adjustment to a second-class status and unjust living conditions.

On the other hand, the capability approach can re-direct the attention of decision-makers to obstacles which limit the full exercise of citizens of their well-being, as it invites governments from the very beginning to focus on what people are actually able to be and do. It may allow looking inside households, and taking account of the inequalities women suffer inside the family and the society at large. Nussbaum's use of the capability approach reveals great potential for developing not only a theory of justice but also a theory of gender justice (Nussbaum, 2001).

However, Nussbaum, influenced by the Aristotelian background she came from, took the application of the capability approach one step further than Sen, namely taking a comparative quality of life measurement to a more normative one, by endorsing a list of central human capabilities - an endeavor to formulate "basic political principles of the sort that can play a role in fundamental constitutional guarantee" (Nussbaum, 2006, p. 57). Following are Nussbaum's capabilities list (Nussbaum, 2000, p. 231- 233):

*"(1) **Life.** Being able to live to the end of a human life of normal length; not dying prematurely, or before one's life is so reduced as to be not worth living.*

*(2) **Bodily Health:** Being able to have good health, including reproductive health; to be adequately nourished; to have adequate shelter.*

*(3) **Bodily Integrity:** Being able to move freely from place to place; to be secure against violent assault, including sexual assault and domestic violence; having opportunities for sexual satisfaction and for choice in matters of reproduction.*

*(4) **Senses, Imagination, and Thought.** Being able to use the senses, to imagine, think, and reason — and to do these things in a 'truly human' way, a way informed and cultivated by an adequate education, including, but by no means limited to, literacy and basic mathematical and scientific training. Being able to use imagination and thought in connection with experiencing and producing works and events of one's own choice, religious, literary, musical, and so forth.*

Being able to use one's mind in ways protected by guarantees of freedom of expression with respect to both political and artistic speech, and freedom of religious exercise. Being able to have pleasurable experiences, and to avoid non-necessary pain.

(5) **Emotions.** *Being able to have attachments to things and people outside ourselves; to love those who love and care for us, to grieve at their absence; in general, to love, to grieve, to experience longing, gratitude, and justified anger. Not having one's emotional development blighted by fear and anxiety. (Supporting this capability means supporting forms of human association that can be shown to be crucial in their development.)*

(6) **Practical Reason.** *Being able to form a conception of the good and to engage in critical reflection about the planning of one's life. (This entails protection for the liberty of conscience.)*

(7) **Affiliation:**

(A) *Being able to live with and toward others, to recognize and show concern for other human beings, to engage in various forms of social interaction; to be able to imagine the situation of another and to have compassion for that situation; to have the capability for both justice and friendship. (Protecting this capability means protecting institutions that constitute and nourish such forms of affiliation, and also protecting the freedom of assembly and political speech.)*

(B) *Having the social bases of self-respect and non-humiliation; being able to be treated as a dignified being whose worth is equal to that of others. This entails protections against discrimination on the basis of race, sex, sexual orientation, religion, caste, ethnicity, or national origin.*

(8) **Other Species:** *Being able to live with concern for and in relation to animals, plants, and the world of nature.*

(9) **Play:** *Being able to laugh, to play, to enjoy recreational activities.*

(10) **Control over one's Environment:**

(A) *Political. Being able to participate effectively in political choices that govern one's life; having the right of political participation, protections of free speech and association.*

(B) *Material. Being able to hold property (both land and movable goods); having the right to seek employment on an equal basis with others; having freedom from unwarranted search and seizure. In work, being able to work as a human being, exercising practical reason and entering into meaningful relationships of mutual recognition with other workers."*

Nussbaum's attempt to create a list for the basic human capabilities can be considered an effort to establish the minimal social justice that can be achieved in every society while leaving room for each society to adjust its own means to reach these fundamental goals, i.e., capabilities. This is Nussbaum's proposal: a list that is subject to modification over time and in different circumstances. This is something I see, as many other scholars did (See for

example Sabina Alkire, 2005; Robeyns, 2005) as not being far from the original idea of Sen about what are the capabilities under debate. Sen leaved it to each society to decide its own list of capabilities with respect to the context of the community under question and its own culture, institutional and economic capacities. Above all it should be a result of public reasoning and discussion.

Conversely, Nussbaum found much more comfort in defining a universal list of basic capabilities for fear that some societies may fall short in guaranteeing their citizens' unquestionable basic capabilities. However, Nussbaum (2006), while defending her list, did not suggest that the list should actually be adopted by all nations all around the world. As there is no international intervention when a certain state decides to ignore these basic capabilities, it seems unclear to me how could Nussbaum's list serve its original goal creation, i.e., guaranteeing the minimum social justice for all and everywhere. Nussbaum's list, then, could better be understood as a political or social policy recommendation. As such it could be used as a reference document for states that care for social justice and, more specifically, intend to apply the capability approach to inform their public policy. Moreover, I argue in this dissertation, Nussbaum's list cannot be taken as a universal one, for it consists of 'combined capabilities', which might be defined as internal capabilities combined with suitable external conditions for the exercise of the function (Nussbaum, 2000). Nussbaum explained it with the following example: "A woman who is not mutilated, but who has been widowed as a child and is forbidden to make another marriage has the internal but not the combined capability for sexual expression" (Nussbaum, 2000, p. 44).

However, if we take another example that illustrates Nussbaum's supported 'combined' capability of freedom of religious exercise, which is considered by Nussbaum as a basic and universal one, thus it ought to be recognized and protected by all nations that care for securing the minimal social justice for their citizens. Yet, if this were to be realized on the ground, we may face a quite unsolvable problem. Religion, in general, takes the form of a very limited and strict doctrine, and I assume that when Nussbaum was defending the freedom of religious exercise as a basic human capability, she had only the major world religions in mind: Islam, Christianity, Judaism and maybe we can add Hinduism and Buddhism. Yet, there are hundreds, if not thousands, of other religious philosophies, groups and trends worldwide. As a matter of fact, I can create my own religion and be committed to its advocacy, granted that all minorities' rights, are to be protected under the capabilities context. The result of this could be the creation of a space for some inhuman, unreasonable, and unjust religious practices. Consider polygamy allowed for men only in Islam for example, or circumcision of boys both in Islam and Judaism.

To reflect on this idea, within the Palestinian context, I would like to bring a current public discussion in the country. On Saturday, August the 17th, 2019, the spokesperson of the Palestinian Authority police, issued a statement condemning the activities of *alQaws*, a civil organization for Gender and Sexual Diversity in Palestinian Society, in the West Bank. The police claimed that those activities are against "traditional Palestinian values". The statement even called on citizens to complain and inform about any "suspicious" activities and for the persecution of *alQaws* staff and activists. (Palestinian Authority Police website, consulted 18th of Aug. 2019).

The police claim that *alQaws* activities are against the Palestinian society's values, comes from the Palestinian constitution that in its article number 14 states that "Islam is the official religion in Palestine" and that "the principles of Islamic Shari'a shall be the main source of legislation" (Palestinian constitution, ART 14, 2003). However, these very principles in Islam prohibit gender and sexual freedoms, in particular, the prohibition of homosexuality, which contradicts *alQaws* work and activities. *alQaws* is a civil society organization founded in grassroots activism that aims at "building LGBTQ communities and promoting new ideas about the role of gender and sexual diversity in political activism, civil society institutions, media, and everyday life." (*alQaws* website, consulted 19th of Aug, 2019). The Palestinian Authority Police in its act, persecuted and prohibited the fundamental freedoms of a certain component of the Palestinian society, as is the LGBTQ+ community, based on religious views of another element of this society, which is the Muslim community. This is the outcome of informing the country's constitution and its public policy based on particular religious dogma, even if it is the belief of the majority.

My point here is that one cannot defend the 'freedom of religious practices' and claim that this is a universal right, or as in the capability approach terminology, a basic capability, while the basis of the capability approach is expanding all human capabilities and *positive freedoms*. Freedom of religious practice is never an absolute freedom and cannot be detached from other freedoms with which it may conflict. Instead, I see the freedom of public reasoning and public discussion, as guaranteed in the capability approach, can allow any religious group to develop and improve its ideological speech, to be more compatible with other freedoms that the approach advocates for. This, I argue, could better guarantee all different social groups respecting 'common reason' above all else, despite having conflicting

views on what is a good life is, as well it respects the space of freedom given to all on an equal basis. In this sense, as I argued, Nussbaum's list fails to be universal.

However, I do not believe the above discussion limit the operational aspects of Nussbaum's proposal. My own thesis methodology and adopted capability approach tools owes a lot to Nussbaum's work, as well as to that of Ingrid Robeyns and Sabina Alkire, who I will be endorsing their work at various points in this thesis. Equally important for my thesis, are the guidelines that I extrapolated from other leading works on the multidimensional conception of WBGB based on the capability approach, which I will present in the following sections.

2.6 REVIEW OF THE CAPABILITY APPROACH APPLICATION WITH A GENDER PERSPECTIVE

The Capability Approach, as I elaborated previously, addresses the well-being of people through their capabilities, rather than any other normative measures, related to resources, income, commodities, utilities, etc. The capability approach as advanced by Sen, sees such material variables as means of living rather than as indicators to good living or evaluation of a person's well-being. Intrinsically, the capability approach is aligned with historical concerns from all feminist movements. This cannot be reduced to any financial attributes when evaluating one's well-being, as in traditional and existing economic theories alike, with concerns such as reproductive health, voting rights, care labor, among others (Robeyns, 2003).

The concerns mentioned above were widely tackled through many feminist studies, which developed several tools to assess the gender impact of public policy and public budgets in particular. This trend is called ‘Gender Responsive Budget’, defined in The Gender Responsive Budgeting website as: “the analysis of the impact of actual government expenditure and revenue on women and girls as compared to men and boys”²⁸ (The Gender Responsive Budgeting, consulted: 2019).

Public Budgets that adopt this new approach can be called Gender Budget (GB). In 1990, Australia was the first country to introduce such a gender focus within its public budget. Since then many other GB initiatives have been adopted worldwide in response to the Fourth World Conference on Women in 1995, at which world governments “made commitments on financing for gender equality and women's empowerment, and reiterated these commitments in a number of subsequent UN summits and conferences” (Seguino, 2013, p.2).

Currently, GB-related implementations in more than 50 countries around the world are precise tools for governmental accountability and measures to progressively realize economic, social, and cultural rights. Such GB initiatives are carried out on national, provincial and municipal levels. These initiatives could include the country’s overall budget or could cover selected sectors of public expenditures, conducted at different levels of

²⁸ The Gender Responsive Budgeting website was launched in 2001 by the United Nations Development Fund for Women (UNIFEM), now UN Women, in collaboration with the Commonwealth Secretariat and Canada’s International Development Research Centre (IDRC). The website strives to support efforts of governments, women’s organizations, members of parliaments and academics to ensure that planning and budgeting effectively respond to gender equality goals. It also aims to promote cross-regional information sharing on country experiences and facilitates networking and collaboration between countries, civil society and international and regional organizations.

country government. Efforts for GB are usually conducted by related governmental institutions, such as the Ministry of Finance in conjunction with the Ministry of Women's Affairs, or could be carried by non-governmental organizations (NGOs) and independent researchers interested in promoting GB with governmental support and open dialogue (The Gender Responsive Budgeting website, consulted: 2019). There are also examples of mixed type initiatives, with groups both inside and outside the government institutions conducting the exercise.

Gender-related budgets, experiences, and applications have, for the most part, only managed to integrate the gender perspective within specific expenditures programs within an overall country budget, or, at best, expenditures programs and revenue within certain ministries with a direct impact on women, such as health, labor, and social affairs (Paloma Villota, 2001; 2003; 2004). Most efforts aimed at protecting gender equality in auditing, rather than assessing "the quality and level of well-being that those policies enable women and the community to achieve" (Addabbo, Lanzi, Picchio, 2010, p.3). Hence, this confirms the need for a more integrated approach to well-being policies, taking account of women's multidimensional well-being as the justified dimension with which to assess and advance the well-being of all citizens (Elisabetta Addis et al., 2011).

Examining gender inequality in resources distribution is still vital here, as such inequalities might be the root cause of other inequalities in capabilities, but it is considered 'insufficient' if not been used in parallel with a deeper analysis of gender inequality within the capabilities context. "This is especially important for assessing which policies can reduce gender inequalities because intervening in the distribution of resources will be a crucial (although not

the only) way of affecting the distribution of capability well-being” (Robeyns, 2003, p. 66).

According to Ingrid Robeyns (2003, p. 67- 69), the capability approach has three major advantages when tackling gender inequality in the public budget context and policies:

- 1. The capability approach has attributes of both individualistic and non-individualistic theory** *It is an ethically (or normatively) individualistic theory. This means that each person will be taken into account in normative judgments. Ethical individualism implies that the units of normative judgment are individuals, and not households or communities. At the same time, the capability approach is not ontologically individualistic. It does not assume atomistic individuals, nor that our functionings and capabilities are independent of our concern for others or of the actions of others. The social and environmental conversion factors also allow us to take into account a number of societal features, such as social norms and discriminatory practices*
- 2. The capability approach considers both market and non-market economy settings when assessing well-being and disadvantage from a gender perspective:** *Inequality comparisons based only on the market economy, such as comparisons of income, earnings, and job-holdings, exclude some important aspects of well-being such as care labor, household work, freedom from domestic violence, or the availability of supportive social networks. They also miss the fact that women spend much more time outside the market than men. These aspects matter particularly in gender-related assessments of well-being and disadvantage*
- 3. The capability approach explicitly acknowledges human diversity** *It recognizes human diversity such as race, age, ethnicity, gender, sexuality, and geographical location, as well as whether people are handicapped, pregnant, or have caring responsibilities*

Elisabetta Addis (2010), has also tackled the issue of gender neutrality and the concept of the ‘individual’ in modern economics, where the family is used as a singular unit when assessing expenditures and collecting relevant data for well-being in the household. She shares as well Robeyns’s vision on the necessity of using the capability approach when interpreting the context of well-being from a gender perspective, while informing public budget and relevant policies. (Elisabetta Addis, 2010).

2.7 GENDER BUDGET INITIATIVE IN PALESTINE

The Palestinian Authority recognizes the necessity of the Public Budget in Palestine to take into account the gender aspect within its different functions and formation processes. In the year 2009, the Palestinian Council of Ministers adopted a decision (No.08/65/12/CM/SF), approving the implementation of gender-sensitive budgets. However, this adoption of a GB was never activated, and the recommended gender units in different Ministries were either approved but not established, or not approved at all. Moreover, the UN Women's report on gender mainstreaming in Palestine (report for the years 2011-2013, (p.42)) stated: "There are units for women that have different mandates than those of the gender units (Health, Social Affairs, and *Awqaf*)".²⁹ Nevertheless, this approach of implementing a public budget sensitive to gender seems to be difficult, as the Palestinian Public Budget is still a simple 'line-item budget'; thus it does not show details of its expenditures and revenues, but rather it gives general figures.

MIFTAH, the Palestinian initiative for the promotion of global dialogue and democracy, has been working since 2003 on a Gender Responsive Budget Program in Palestine, in order to "activate national policies which are interpreted into a Gender Responsive National Budget" (MIFTAH, 2011, p.1). MIFTAH is working to ensure the translation of the Palestinian government's commitment to women and gender issues on the ground. It is carrying out this program in line with its strategic objective that is "to influence policy and legislation, to

²⁹ See the "Cross-Sectoral National Gender Strategy for the occupied Palestinian territory" program, developed by the Palestinian Authority Ministry of Women's Affairs with the support of UN Women. 2011-2013.

ensure the safeguarding of civil and social rights for all sectors, and their adherence to principles of good governance.” (MIFTAH, 2011, p.1).

2.7.1 GENDER RESPONSIVE BUDGET EXERCISE IN PALESTINE

MIFTAH’s Gender Budget-related programs are mainly funded by independent organizations, NGOs, or/and international organizations. Those programs were conducted on both the national and local government level.

On a National Level: MIFTAH carried out a series of interventions and advocacy activities (Towards Instituting a Gender Responsive Budget); these activities and related outputs can be summarized as follows (MIFTAH, 2011, p.1 and p. 2):

1- The publication of a series of assessment studies of the impact of services provided by different governmental entities; namely, the Ministry of Labor, the Ministry of Health, the Ministry of Education, on both women and men. Such studies are believed to work as a “reference document to endorse the feasible recommendations and interventions for integrating gender in these different sector’s plans, policies, and budget.” (These studies were taken into account in the applied part of this thesis).

2- MIFTAH conducted specialized on-the-job training, on gender mainstreaming, and on participatory planning and budget analysis. This training targeted 43 members of planning and budgeting committees in five ministries: Social Affairs, Education, Health, Labor, and Ministry of Women Affairs. The training was conducted in two days at each ministry as a pilot intervention and was completed by July 2011. However, no

evidence of the impact of these training activities could be tracked in MIFTAH publications.

3- Based on the training workshops at the five ministries, MIFTAH published a GRB Guidebook, which was developed and finalized by a team of specialists. The guidebook was provided to all ministries to be used as a guide for gender budgeting applicable procedures. In addition, it has been disseminated to relevant CSOs, universities, municipalities, the Prime Minister's office and the office of the Palestinian Legislative Council.

4- MIFTAH prepared a policy paper on the status of Palestinian women and the Informal labour Sector, to advocate policy and decision-makers for better endorsement of policies responding to gender needs and demands.

5- MIFTAH conducted a seminar on gender-responsive budgets in cooperation with the Ministry of Finance, which brought together stakeholders, representatives of different ministries, NGOs, and partners. The aim of the seminar was to come out with future practical interventions to execute and to process a gender-responsive budget at the national level. The outputs and recommendations were documented in a report to be used for advocacy purposes with policy and decision-makers.” This seminar was held on November 2011.

On the other hand on the local Governance level, the project Gender Responsive Budget in Local *Councils* consisted of four pilot initiatives implemented in four municipalities: Birzeit, Halhoul, Anabta, and BaniZaid (West Bank 2007-2011). The project included a revision of strategies of the mentioned municipalities from a gender perspective. Local councils were

also provided with gender indicators and guidelines for integrating gender (MIFTAH, 2011, p.10-p.12). The Gender Responsive Budget in Local Councils related activities included the following activities:

- 1- Preparatory and regular networking meetings with key players.
- 2- Participatory needs assessment survey through a gender perspective.
- 3- Participatory Gender-based strategic planning process for local councils.
- 4- Revision and evaluation of municipalities' strategic plans from a gender perspective.
- 5- Impact evaluation session;

On November 17, 2011, MIFTAH organized an impact evaluation workshop with the participation of representatives from the four municipalities and the Gender Unit from the Ministry of Local Governance, Local Governance Support Program/ UNDP, Development of the Local Governance and Civil Society Program/ GIZ, and the Palestinian Central Bureau of Statistics (PCBS). However, apart from published assessment studies and reports and the one-time on-job training provided to the Planning and Budgeting committees in five Palestinian Ministries in 2011, there are no actual outcomes of this initiative, and in reality there is no tangible impact of this long-time established initiative on the ground, nor real effects on the Palestinian citizen's quality of life and well-being.

2.7.2 EXAMINING THE GENDER BUDGETING INITIATIVE IN PALESTINE

The Public Budget is not only about numbers. Instead, it should reflect government strategy and performance towards meeting national needs and aspirations, in line with the reasonable use of public resources. It should as well form the primary tool for government accountability and impeachment in case of misuse of national assets and public money, according to the United Nations HRBA portal. “The Public Budget is the outcome of systems and relationships through which the varying needs and desires of a nation are heard, prioritized, and funded” (HRBA, consulted: 2019)).

The Palestinian Public Budget, in spite of successes in some areas, still suffers, in my opinion from the same structural problems that have plagued previous budgets. It is still a line-item budget like its predecessors, and still faces difficulties in the transition process towards a program performance budgeting system (GB Guidebook, MIFTAH, 2011). Line-item budgets emphasize inputs and provide information on how much is spent and how it was spent, rather than what it was spent for. It does not link inputs with outputs. Hence it says nothing about how efficiently resources are being used. The problem with such a budget is that it tends to attract decision-makers’ focus to details of marginal issues and costs (such as if stationery in government offices were consumed correctly, and how much they have been gone up or down compared to last year’s budget) rather than on the efficiency and effectiveness of the programs which these offices are implementing (Babunakis, 1976). Thus, the public budget is not tied to government plans for sustainable development.

Moreover, the goal of financial sustainability remains elusive in the Palestinian budget. Therefore foreign aid is still vital, while there are no clear objectives in terms of public spending adopted policies, to say nothing of the absence of the government's legislative accountability regarding its financial performance. The particular case of Palestine as I have clarified before, makes the Public Budget formation process of particular importance, given the factual circumstances of the political, economic, and social situation of the Palestinian people. These circumstances have created structural distortions in the Palestinian economy, and hindered the development of sustainable budget process and created noticeable gaps between different segments of the Palestinian society and between its geographical areas. The Palestinian Budget in its majority depends on foreign aids, Arab and international donors. Not to mention the dependence on the Israeli side in tax collection, since Palestine has no actual control on any of its borders.

Consequently, such a particular situation cannot be addressed by traditional budgeting system and economic approaches without serious government intervention, because Palestinians do not have any complete control on their resources, but the government can manage the received aids and funds to enhance people's well-being and the quality of their lives. Hence, the most important and effective form of government intervention can be indeed changing its fiscal policies that form and generate its annual budget. That said, the Public Budget could not be neutral towards a real representation of different society segments, their rights, interests, and aspirations. In what follows, I will try to illustrate how the selected approach for application to the Palestinian case and developed methodological tools in this thesis, are capable of filling the gaps in gender budgeting initiative in Palestine.

2.8 GENDER BUDGET BASED ON THE CAPABILITY APPROACH

The appeal for ‘public budget’ to be gender-sensitive and to view the well-being of people through this perspective, is important in general, but specifically very important in Palestine or any other continuous conflict area, if we want a lasting peace, building of democracy, sustainable economies, or any stabilities.

A gender-sensitive budget perception or ‘gender budget’ as illustrated previously in this chapter existed mainly to recognize the gender inequalities in public expenditures, designed policies, resources allocation, quality of services provided, etc. Nevertheless, Sen takes us to another dimension of ‘measuring inequality’ by raising the question: *Equality of what?* (Sen, 1979).

Sen, in his capability approach, talked precisely about the issue of inequality, not only gender-based inequality but also that one that takes all social categories, in a certain society, into account. His plausible argument of human diversity and how we differ from each other, not only by our gender identity but also in our sentimentality, physical and mental abilities to name some of those differences, in addition to the recognition of ‘external characteristics’ of inequalities such as: our experiences, social environment we happen to live in, etc. (Sen, 1992).

Moreover, he explained, tackling the inequality issue starts with a comparison process between two persons (two social subjects in the case of public budgets), in a particular ‘focal

variable', the domain of comparison in other words, such as wealth, income, liberty, rights, etc. Now, in addition to this, the fundamental contribution that the gender budgeting through the capability approach offers us, is to direct this 'focal variable' to a combination of freedoms and achievements, i.e., capabilities for all citizens, hence different social subjects (Sen, 1992).

This new multidimensional perspective of viewing public budgets and public policy is critical for different reasons:

Firstly it recognizes women as 'fundamental subject' in the society such as men, thus the female subject, can be also divided into different categories by social or physical conditions, and therefore recognize how her gender identity intersects with other identities she might hold, without compromising how these different social categories with which she identify, or to which others assign to her, affect her psychological makeup, her social behaviors, and her entire life outcomes

Secondly, it encourages the state to recognize the diversity of its citizens and their potentials, thus to support them in the right way, for them to be able to realize these potentials. And by doing so, it takes account of inequalities inside the household as much as it takes account of inequalities in a collective shared social space.

Thirdly, it gives the well-being state a roadmap to empower its citizens and to secure equal opportunities for all, thus to establish a good and valuable life, through providing new policies and norms, therefore, new infrastructures and services (Addabbo, Picchio, Corrado and Badalassi, 2011).

While approaching well-being, we should invest in women within all their social categories and subcategories, not only because women are usually among the most disadvantaged ‘social groups’³⁰, but also because the accurate indicators of well-being can be found inside households where the individual especially the adult man, receives the most significant portion of his well-being and because usually the care of others considered as a constructed duty of woman (Addabbo et al., 2011).

According to the gender budgeting based on capability approach, it is not only a matter of equal distribution of ‘resources’ between women and men but rather, creating equal opportunities that enable them to transform those resources into a good life, thus enhance their own well-being. In other words, to focus on actual living and quality of life that people can enjoy, instead of means of living. For example, working members in the family, who are most cases men, will define the household resources distribution among other family members, which usually results in ‘unequal’ chances to enjoy such resources, between male and female members. It worth mentioning that even if a woman in a family will be as well a working member, the distribution process will still be conducted or at least affected by men in her family.

Household care, gender-based violence, family conflicts, unpaid housework, are all domains of interest when measuring levels of ‘deprivation’ and ‘inequalities’ between people through gender budgeting that is based on the capability approach. Respectively, in the following

³⁰ Think about disadvantaged social categories like: the child, the old, the sick, the handicapped, the ones with mental challenges, and then think of a: handicapped woman, a sick woman, a female child, a woman with mentally challenging disorder.

section I will present the methodology applied in this research to the case of Palestine to promote a gender budgeting based on the capability approach, or simply the Well Being Gender Budgeting.

2.8.1 GENDER AUDITING IN A CAPABILITY APPROACH: WELL BEING GENDER BUDGET METHODOLOGY

The *Well Being Gender Budget* (WBGB) methodology, was developed by three Italian scholars: Tindara Addabbo, Diego Lanzi, Antonella Picchio in ten years-long efforts, through a sequence of literature, working papers and conferences' proceedings (see: Addabbo, Lanzi, Picchio: 2008a; 2008b; 2010, 2011, among others).

This methodology presents a new approach to Gender Auditing (GA) of public budgets by applying the Capability Approach. It “uses a macro-economic feminist perspective to make the capability approach operational in the policy space” (Addabbo, Corrado, & Picchio, 2014, p.1). This methodology has been used to produce gender budget assessments in several contexts. Specifically, in the Emilia Romagna region in Italy, where its first application has been used across three different levels (Addabbo et al., 2011)

The Region as a whole, then Modena Municipality and the Modena district, at the *regional level*, various tools have been designed and used. In this exercise the advantages and disadvantages of men and women in a society in terms of their opportunities and freedoms, especially in access to public services, namely health and education, were defined as a set of functionings/capabilities, and presented in a gender auditing matrix, including some simple

indicators (Addabbo et al, 2010). At the *provincial level*, the methodological tools that have been used were extended from the reproductive well-being approach “that not only focuses on women’s inequality but also introduces a new concept of social sustainability” (Addabbo et al., 2004, p.2; Addabbo et al., 2010). At this level, a list of capabilities was developed to reach this multidimensional aspect of well-being. This list of capabilities was derived from the political responsibilities of the local government concerning the well-being of residents, as presented in public documents.

At the *municipality level*³¹, the focus was on creating a network of institutions that are willing to cooperate towards enhancing citizens’ well-being. It also gives a lot of attention to the capability of caring in particular (Addabbo et al. 2004).

The WBGB approach presents a “people centered budgets that, endorsing women’s material, ethical, cultural and economic experience”, beyond the common gender equal opportunity policies (Addabbo et al. 2014 p.3). Thus, it cares about scrutinizing invisible economic (production) activities such as unpaid work, and women care work, a thing that reveals true policy priorities and if they consider gender inequalities in well-being or not.

The WBGB framework extended efforts, have managed to develop tools and criteria necessary for aggregating an implicit list of capabilities, per local public administrations

³¹ This methodology has then been more recently applied to different local governments in Italy and a survey on a selection of cases can be found in (Addabbo, Lanzi, Picchio, 2010).

responsibilities and commitments towards the well-being of their citizens (Addabbo et al. 2010), alongside internal discussion with the administrators and analysis of public documents accompanying the budget. As a result of these efforts, an intrinsic list of capabilities for Italian people was presented, this list consists of the following capabilities (Addabbo et al. 2008, p.19-21):

1. *“Access to knowledge*
2. *The capability to live a healthy life*
3. *The capability to work and carry on business.*
4. *Access to public resources (services and transfers).*
5. *To live and work in adequate and secure places and in an eco-compatible environment.*
6. *To travel (This refers to the individual’s ability to move about within the province.)*
7. *Caring for others.*
8. *Caring for oneself.*
9. *Participating in public life and living in an equitable society”.* (Addabbo et al. 2008, p.19-21)

The WBGB methodology was also adopted by other countries’ contexts apart from Italy, for example, Spain, Turkey and currently in Palestine as far as this thesis is concerned. However, the WBGB efforts in Italy at present have moved only at the Local governments’ level and some public administrations such as Universities and Schools. These applications of the methodology in Italy or the other mentioned countries can be tracked in survey provided in next section

2.8.2 SURVEY ON THE APPLICATIONS OF THE WELL BEING GENDER BUDGET

The WBGB approach was created in Italy and later adopted in Spain and Turkey, within each country's own modified methodological tools for assessing the Gender Budgeting process, as I have presented above. However, in the case of Palestine, only the applications of the approach in Italy and Spain were the references.

With respect to previous discussion, a selection of the different applications of WBGB approach in Italy, Spain and Turkey, are tracked in the following Table 2.1, where I have traced the various projects, that were concerned in applying the WBGB methodology, specifying each project research team, year of implementation and at what governmental level it was applied, in the different regions and cities in these countries. Moreover, this survey also traced as well the specific capabilities that each project has produced or studied. Further, complete references to each of these projects can be found in the bibliography of this thesis, for any additional information.

Table 1. A selection of actual applications of the WBGB approach in Europe.

Country	Team	Year	Level of government Application	City	Region	Capabilities	Project
Italy	Tindara Addabbo, Diego Lanzi y Antonella Picchio	2014	Municipality / (Local government)	Vicenza	Veneto Region	-	Intense programme of training activities on WBGB

	Tindara Addabbo, Diego Lanzi y Antonella Picchio	2009 / 2010	Municipality	Modena	Emilia Romagna	Care of others	Evaluation of governmental projects/expenditures at the municipal level
	Francesca Corrado	2009	Public administrations (Istituto Cattaneo Deledda, (high school)	Modena	Emilia Romagna	- Having access to knowledge (Education, Training and Information) - Having access to research	Project: Democracy & Participation.
Spain	Paloma deVillota, Yolanda Jubeto, Ignacio	2009	State level (Women Institute)			List of capabilities was produced	Strategies for gender mainstreaming in public budgets. (Ministry of Health, Ministry of Labour and Social Affairs)
Turkey	Yelda Yucel, Gulay Gunluk-Senesen (ongoing project)	2014	Municipality	Kars, Şanlıurfa, Nevşehir, İzmir, Samsun, Erzurum, Diyarbakır, Kayseri, Manisa, and Ordu		List of capabilities was produced	Public Policies, Local Governments, Gender Budgeting: Women Friendly Cities, Case of Turkey'.
Spain & Italy (common project)	Tindara Addabbo, Lina Gálvez-Muñoz, Paula Rodríguez-Modroño	2014	Public administrations (University of Modena and Reggio Emilia, Pablo de Olavide University)	Modena, Italy / Seville, Spain		Being able to use the senses, to imagine, think, and reason and do these things in a “truly human” way informed and cultivated by an adequate education, including by no means limited to, literacy and basic material skills.	Gender budgeting education in a well-being approach

It is worth mentioning here, that no actual application of the WBGB methodology could be tracked in Spain apart from the above-mentioned in table. Moreover, the Autonomous Community of the Basque Country (Spain), advanced different debates and discussions on the plausibility of mixing these methodological tools within their own adopted tools for Gender Budgeting, which are also the same GB tools applied in Andalusia Autonomous Community (Spain). However the Provincial Council of Gipuzkoa is believed to be the only province in Spain, to take into account the well-being aspects when analyzing the budget with gender perspective, and its capital city San Sebastian was producing a gender impact report of their budget only as from 2014 (Yolanda Jubeto, 2014).

2.8.3 SPANISH METHODOLOGY FOR GB: "STRATEGIES FOR GENDER MAINSTREAMING IN PUBLIC BUDGETS"

This methodology was developed in Spain, in 2009, by a research team from the Complutense University of Madrid, directed by Paloma de Villota and supported by the Women's Institute (Instituto de la Mujer). As a first step, the Spanish methodology presents in details the steps to create a gender impact assessment report for budget law; also, it presents to adapt the budgetary rules for gender impact assessment.

Likewise, the Spanish methodology suggests analyzing the entire budgetary process, from the drafting stage until execution, in order to have a better view of the gender impact in the national budget. The analysis and related suggestions were always linked to the constitutional budget acts, and relevant laws in Spain. Moreover, this methodology suggests with clarity

what exactly should be done at each phase, and by whom it should be done, meaning what governmental body is responsible for the implementation of a certain activity, and finally the gender impact analysis of that activity. This analysis is supported by specific tables that make the whole gender budget analysis process more organized and seems an easy task to do, despite the fact that undoubtedly, it is not.

Moreover, a description of the regulatory changes required for the introduction of the gender perspective in public budget and policies was presented. In what follows, I will try to summarize some aspects of the Spanish proposed methodology for conducting gender budgeting:

The Spanish methodology states that the analysis of budgetary programs should be carried out in two consecutive phases, described below:

1. Preliminary classification of fiscal plans according to their gender impact, detection of unpaid work, and sexist biases of language.
2. Application of the capability approach for analyzing gender impact on public budgets.

For the second step, the Spanish methodology builds on the multidimensional definition of well-being, derived from the previously mentioned methodology of WBGB, while in the other hand, for the first step, the programs are classified according to the explicit or implicit gender impact, and a detailed study of language is made.

Finally a description to detection of invisible work in program implementation is given, hence, the Spanish methodology emphasizes that when analyzing the budgetary programs must be detected if its execution conceals an invisible work, as well as assessment for the impact on the time available for women and men, a thing that was also a matter of concern for the WBGB methodology. It is for these particular characteristics; some aspects of the Spanish methodology were considered compatible and operational as well for the Palestinian case.

CHAPTER THREE: WELL BEING GENDER BUDGETING FOR PALESTINE

3.1 INTRODUCTION

The gender inequality problem in the conflict-torn Palestinian society, make it more difficult for women than men in accessing resources, hence to be employed and to have paid work, leading to negative effects on women's well-being and the quality of their lives (Nahla Abdo, 1999; 2006). To examine this issue, we need to look at the structure and power dynamics not only in the Palestinian society but also inside the Palestinian household, where income is shared and distributed, to which income-based approach falls short of addressing (Robeyns 2003, 2010; Addabbo, Lanzi and Picchio 2010).

This thesis suggests that we can overcome the shortcoming of the income metric approach to address the problem of gender inequality in access to resources, by an empirical application of the capability approach, in particular, the Well Being Gender Budgeting framework (Addabbo, Lanzi and Picchio, 2004). Hence this chapter seeks to answer the question of how gender inequality in access to resources has impacted Palestinian³² women's capability to work and be employed, within the last six years. This specific capability was chosen according to its foreseen positive effects on developing different dimensions of well-being of

³² This study is based on the field work conducted in the Palestinian territories including only the West Bank.

the Palestinian citizen, and its critical implications on other capabilities, especially for women. According to Robeyns (2005), this capability reveals a lot of gender inequalities, hidden in the private and public spheres. These effects can be detected and examined through the WBGB as the methodological and analytical framework, complemented by the capability approach as the theoretical framework, and accordingly, recommendations and policy suggestions can be delivered.

3.2 FROM CAPABILITIES TO REAL OPPORTUNITIES

Amartya Sen has repeatedly emphasized in his work, but more intensively in *Commodities and Capabilities* (Sen, 1999), on securing citizens' capabilities, as well as the process by which resources, goods, and services —be it marketable or non-marketable ones— help converting them into real opportunities, thus actual *functionings*. He argues that “different people can have quite different opportunities for converting income and other primary goods into characteristics of good living and into the kind of freedom valued in human life” (Sen, 2009, p. 254). This conversion process of goods and income into valuable capabilities and opportunities that enhance people's lives, is not only dependent on personal characteristics and differences, but also is usually influenced, according to Sen, by different sets of interrelated factors, which can be found in the life settings surrounding people, be it social, natural or environmental (Sen, 1999 and 2009). In this sense, Sen asserts that the possibility of establishing this conversion process is historically settled on social and collective terms, and geopolitically informed and based on social structure.

Obviously, we seek goods and care about services for what they enable us to do and be, for example, we buy a car not only because of its brand and shape but essentially because it allows us to move easier and faster than walking. The car, a commodity that we can buy with our income, enhances our capability for mobility, this relation between the good and service, and the achievement of a certain capability is called the *conversion factor* (Robeyns, 2005).

However, since we differ as individuals, then our conversion factors also differ due to our personal features that we were born with such as metabolism, physical condition, sex, gender, etc. For example, a person with a mental challenge (considered as disability), who has or can buy a car will face more difficulties in using this ‘resource’ to enhance her/his functioning of mobility, than a person with no such challenging condition. These conversion factors affected by our personal characteristics are called: *personal heterogeneities* (Sen, 2009), or simply *personal conversion factors* (Robeyns, 2005). Conversion factors can deeply be affected by other external conditions and not only dependent on our ‘internal’ personal attributes. As mentioned above, our ability to achieve a certain functioning could be affected by society and the environment, in which we live. Contemplating on previous car example, a woman living in Saudi Arabia who own or can buy a car, has a lower conversion factor in achieving the functioning of free mobility³³, than a woman living in Spain, for instance, basically because social norms and laws in the former country, forbid women to drive cars, whatsoever. Such factors coming from the society and institutions are referred to as “variations in social climate [and] differences in relational perspectives” according to Sen (2009, p.255), or we can simply refer to them as *social conversion factors* (Robeyns, 2005), these factors include things such

³³ This changed recently as the A royal decree was issued in September announcing the end of the ban on women driving in June 2018

as public policies, gender, and race (discrimination based on gender or race), societal hierarchies, local norms and culture, the power relationships between people in a particular community and within family, equality of distribution of resources, among others (Flavio Comim, Mozaffar Qizilbash & Sabina Alkire, 2008).

Finally, factors emerging from nature or the physical environment surrounding us, are called *environmental conversion factors*, including diversities in the physical environment, such as climate, pollution, infrastructure, means of transportation, etc. (Sen, 2009; Robeyns, 2005). If there is no good routing or connections between cities (roads, bridges and so on), such as in the case of the Palestinian territories, people will not have high environmental conversion factors, thus will not be able to reach their full potentials or real opportunities of mobility. Problems in routing and geographical connection inside the Palestinian territories are to a large extent affected by the Israeli military occupation and restrictions of movement for the Palestinian citizens in general, but also freedom of movement for a female Palestinian citizens, in particular, are profoundly affected by the existence of consent of their male guardians (Hannah Rought-Brooks, Salwa Duaibis, and Soraida Hussein, 2010). This relation between a person's capability set, and her/his social, environmental and personal context, was illustrated by Ingrid Robeyns in an informative scheme (Robeyns, 2005, p. 98), where she explains the multidimensional model of well-being that the capability approach is offering. This model consists of a plural set of objectives and opportunities, i.e. (capabilities), as the determinants of people's well-being and quality of life instead of any other singular measure, such as GDP, income, or utility. It takes into account that individuals' perception of well-being does not only depends on their own personal characteristics and variables but also is

highly influenced by other external factors that come from the society and environment in which they live in.

Thus, in order to secure real opportunities for people, and be able to live the quality of life they aspire and deserve, all these factors should be taken into consideration when assessing public policies and setting public expenditures.

3.3 DOING AND BEING IN THE PALESTINIAN CONTEXT

One of the significant features of the capability approach is that it acknowledges human diversity (Sen, 1992 & 1999; Comim; Qizilbash & Alkire, 2008). Human diversity, according to the capability approach, depends on many factors, including personal heterogeneities but is not limited to them. The society also shapes the process of evaluation of a person's capability that she or he lives in, thus social norms, culture, and social relations, and power relations inside the society and within the family. This thesis suggests that the capability approach can be applied to the Palestinian context, despite the military occupation it suffers from, combined with social injustices, and produced by a patriarchal society that still perceives women as inferior citizens than men (Rought-Brooks, Duaibis, and Hussain, 2010).

In Palestine, there is a need for comparison between advantages and disadvantages that people may have, to learn more about their capabilities altogether, and not to focus only on a particular 'disadvantage', or status of 'deprivation' that they might suffer from. We need to look at the whole picture to see the overall capabilities of Palestinians. Palestinians, women,

and men ought to be seen in all of their real ‘beings’ and ‘doings’ and not only as occupied (unfree) people. In this sense, this chapter intends to develop an argument against the public policies that perceives the Palestinian citizen identity as a homogenous entity, without taking gender and demographic differences into consideration. Taking the capability of access to resources as a leading example, this chapter questions the collective and individual factors that helped to present the Palestinian identity as such, by examining the public policies that overlook invisible social differences, and silenced social struggles inside the Palestinian society.

3.4 A NEW APPROACH: WELL BEING GENDER BUDGETING

Well Being Gender Budget framework, defines the individual well-being as the extension process of a set of capabilities, where inequalities are conceived as dis-functionings in a certain social space. Hence it presents a feminist approach to social inequalities, where women are disadvantaged in terms of their capability to access resources, health, and education and even in the control of their bodily health and integrity.

WBGB uses a macroeconomic feminist perspective to make the capability approach operational in the public policy space. It expands the scope of the policy impact assessment taking into account women’s multidimensional well-being, and the contribution of their unpaid work to the well-being of other members of the society (Addabbo, Lanzi and Picchio 2010). Italian scholars first presented the capability of access to resources as one of the essential capabilities they have developed for Italian people (Addabbo, 2008). It was defined

as the person ability to access public and private resources, and being able to work and access the labour market, and to participate in scientific and cultural projects, as well as being able to receive support and fund for one's projects, that may have a positive effect on society.

In this sense, the enhancement or the diminishment of this capability, can directly affect other aspects of the individual's well-being, as her or his capability for caring for others, thus being able to take care of dependents (children, elderly, those with special needs or mentally challenged) in one's family, and to show concern for others in society (doing voluntary work for example), and being able to live with and towards others, by engaging in various forms of social interaction (Robeyns 2003; Lewis and Giullari 2005; Addabbo, Lanzi and Picchio 2010).

In the same context, it can affect the individual capability of caring for oneself, hence being able to take care of one's own body and mind, or participating in public life and living in an equitable society (social and political participation), being a part of social network and to give and receive social support, and to have an opinion on the country's policies, and be able to participate in the decision making process.

In this chapter, I consistently introduce the capability approach to gender budgeting in Palestine, by carrying out an analysis regarding this capability of accessing resources, due to its high influence on the different aspects of the Palestinian citizen well-being in general, and on Palestinian woman's well-being in Particular.

This process includes the allocation of different indicators to this capability, as an attempt to examine its transformability into real doings and beings, while on the other hand, defining the means to achieve the functioning of being employed or having a paid work. The process of choosing relevant indicators applies the two categories of indicators: functional/realistic indicators and desirable indicators that Robeyns (2005), has developed and discussed widely in her work on ‘the choice of indicators’. *Functional* indicators are those that can be calculated using the available information, by contrast, *desirable* indicators can be described as necessary and appropriate given the proposed goal, but for which there is not enough information to allow any meaningful calculation. It is crucial to determine these indicators because they identify gaps in currently available data, thus help to define the fields where more information is still needed.

3.5 FROM AN ANALYTICAL PERSPECTIVE TO A POLITICAL PRACTICE

Analyzing people’s well-being under the capability approach, we should work on two levels: the level of observed achievements (*functionings*) and the level of desired opportunities (*capabilities*). How an individual is actually practicing his or her life, his or her real beings and doings are called *achieved functionings*. These achieved functionings are what the WBGB framework, is aiming to match with people’s aspirations, needs, and values (Robeyns, 2003).

With this new shift in thinking about well-being and gender budgeting, researchers tend to measure people’s functionings in their natural settings, in order to learn more about their capabilities. Thus, secondary data sources were used in this research to collect valuable

information about people's achieved functionings, and their livelihoods, which enables sorting out relative indicators and reflecting on the quality of people's lives. To achieve this objective, recent official statistics on the demographic, social, economic and environmental status and trends in Palestine, conducted by The Palestinian Central Bureau of Statistics (PCBS, 2016), were used in this research.

Moreover, a mix of forecasting methods and participant feedback was used to anticipate the desired opportunities (capabilities), by defining current circumstances and constraints to obtain them. An exploratory fieldwork was done in this regard through two phases. In the first phase, some indirect questions were addressed to a group of participants, all Palestinians, from different ages, genders, social profiles, and educational backgrounds, to study their notions and conceptions of their own well-being and quality of their own lives. The output of this session provided an important preliminary material for examining the plausibility of the chosen capability of accessing resources. In the second phase of fieldwork, an online survey was used, to select the most relevant indicators to this capability, hence analyzing functionings and related conversion factors.

3.5.1 ONLINE BRAINSTORMING SESSIONS AND SURVEY

As I have mentioned to try to identify what 'well-being' would be for Palestinian people -at least as a preliminary exercise- a brainstorming session was held online. This unconstrained brainstorming session was held in one month, from February till March 2012, with active participation of 148 people. Purpose and objectives were explained to participants by making a notion that the Facebook group (online poll) was created for academic research on well-being and quality of life in Palestine. Moreover, privacy and protection of personal data were

also taken into consideration by declaring that no names or any other personal data will be used further in this research or any other, and that the group was only a brainstorming session for abstracting information about the Palestinian citizen thoughts of value in life. Additionally, participants were informed that gender differences will be taken into consideration and that those who are not living currently in Palestine, should hand on the questions to at least one friend/ relative, who lives there. In this brainstorming session, the addressed questions were:

- What does a 'good life' mean to you?
- How do you define/describe yourself?
- How do you make your decisions?
- How do you learn/gain knowledge?
- How do you relate to others in your family or society?
- What is the main obstacle in practicing/ or having 'your desired' daily life?

This thesis suggests that such questions directed to a group of Palestinians, will help to have a general perception of what is considered important to this particular nation, and what are their own views of their states of doings and beings, such information would be a starting point for inciting on public discussions promoted in this thesis.

As a second step in examining the capabilities of the Palestinian people, the answers and information received in previous brainstorming sessions were analyzed and connected to existing literature on WBGB and the capability approach. In a further step to test the

relevance and credibility of the chosen set of capabilities a third more comprehensive process was conducted, which included an online interactive - informational survey, together with several discussion sessions with some Palestinian public figures.

3.5.2 SECOND STAGE:

In March 2013, an online interactive survey was first opened, two types of open questionnaires were created, and the first one was in general about Well Being and Gender Budget in Palestine, while the second was about Work and Employment in Palestine. Furthermore, 65 persons participated in this online interactive survey; 54 % of the sample were women, while 46% were men. All participants from the first online poll were invited to participate in this second stage; however, only those 65 participants were able to complete both online surveys. It should be stated, that participants sample in both phases are not representative of the Palestinian population, but were chosen to examine and give credibility to the capabilities of Palestinian people studied in this research. Hence, the results and collected information from the web-based informational survey, in conjunction with previously mentioned discussion sessions, have paved the way to choose the most relevant indicators, analyzing functionings, and related conversion factors, these indicators will be presented and integrated into the discussion, in this and next chapter.

3.5.3 SURVEY POPULATION:

The selection process of participants was mainly based on two criterions:

- 1- being a Palestinian
- 2- being interested in promoting a well-being system in Palestine.

Moreover, when a participant met these above conditions, other criteria were taken into consideration, such as gender, age, and place of residence, to enrich the research findings.

Participants in both stages of fieldwork were purposely selected to represent a variety of people within the predefined research criteria (Donald Campbell, 1955; Mark Tremblay, 1957; John Seidler, 1974; T.S Karmel & Malti Jain, 1987; Russel Bernard 2002), accordingly gender, geographic location, and age in some cases were taken into consideration to reflect the diversity of opinions as possible.

The group of people who participated in the first stage of fieldwork consisted of 148 persons, were contacted through a public call on Facebook. I insisted on this call to explain that the participants' spatial location, educational level, socio-economic situation, age, and gender are essential for guaranteeing diversity in this research sample; but pointed out that these characteristics will not limit their chances of active participation in this online poll. Through the active survey, I was especially attentive to the indicators related to the theoretical framework, even though at the same time I tried to avoid imposing the analytical framework on the structure of the online survey questions.

3.5.4 EXPLANATION OF SAMPLE SELECTION

Appropriate sample and settings selection is a fundamental issue for any research; thus a perfect guide for the selection process is the research question and objectives (Catherine Marshall and Gretchen B. Rossman, 2010, David Silverman, 1998). Having this in mind, through the preliminary stage of the research, which was basically an exploration period as I have said previously, I handled a fieldwork that for its first phase relied upon an open discussion on a set of questions, raised on social networks, namely Facebook, to create a sample that was not, however, intended to reach statistical significance, it was a snow-ball sample pool that once published in Facebook targeted the audience of different groups of people who got to know about the petition and were willing to participate. All participants were Palestinians, women, and men, from different age groups, living currently in Palestine or in the diaspora, and from different backgrounds and educational levels.

It was essential for this research, to have Palestinian citizens' capabilities outputs disaggregated not only by gender, age, professional conditions, but also whether they were living in Palestine or not (refugees status for example). When participants were living in Palestine, a question about where were they living was pose, as it is vital for the sake of this research: West bank, Jerusalem, Gaza, or the 1948 occupied lands (now Israel). As such, and for this particular research purposes, all participants were residents of the OPT of West Bank. This may be explained by the difficulties in accessing social networks and the Internet by the people living in Gaza Strip under Israeli blockade. The second phase of this first exploratory fieldwork included conducting an online survey, in parallel with one-to-one discussion sessions that included 10 Palestinian figures (some of them were artists, peer academics,

acquaintances, friends and relatives), which repeatedly held in my field visits and several stays in Palestine.

3.6 DATA ANALYSIS

Survey participants were asked certain questions to help to anticipate their functionings and conversion factors, thereby how these affect their capability to access resources. When participants were asked if they have a driving license, 59% answered “yes”, out of which 26% were women³⁴. While when asked if they own a vehicle, only 32% said they do, with 12% of women only giving this answer. Participants were also asked if they need a permit to go out of the house, 69% of them said no, in this case, this answer, however, was given in majority by men while almost 50% of women participants said that they need such permission from a family member (father; mother; a brother; husband, etc.).

Another question was raised about if they need to cross an Israeli checkpoint in their daily route; not surprisingly 49% said yes. In turn, 53% said they *sometimes* use the same route in search of work while 31% said they *always* use the same route, and only 16% said they **do not**. It is relevant to know that 67% of the sample clarified that they use public transportation on their daily route, to go to work or to search for work likewise, out of which 64% were

³⁴ It worth mentioning here that there are no official statistics on percentages of holders of driving license by gender within the Palestinian population. However, in this research, having a driving license and owning a vehicle, were linked to having more assets and access to resources among participants, especially men. Among research sample 37 % of participants indicated that they were unemployed, during that time. Out of which 65% are women. On the other hand, 41% of total number of participants informed positively on having their own assets such as house, land property, bank account, etc.

women. Participants from both genders also complained about the adverse conditions and bad quality of road networks in their area. 71 %, in particular, were not satisfied at all with roads infrastructure in their areas. One participant mentioned in her answer that “the streets are always crowded, the roads are not of good quality”. Such facts confirm that participants manifested that have a mix of high personal conversion factor and low social conversion factors, for their capability of mobility, which in turn has implications on their other capabilities, but most importantly, their capability of access to resources, under discussion in this chapter.

In order to assess the capability of access to resources within the WBGB framework, I used the obtained empirical data, to sort out the achieved functionings of our participants, and their related conversion factors. Social and environmental conversion factors will be our index, to highlight the government’s responsibility for increasing these conversion factors, in order to enhance people’s capabilities and thus their well-being and quality of life. Table 1, classifies indicators derived from participants’ answers in fieldwork, to scrutinize different functionings and related conversion factors for the capability of access to resources.

Table 2. Capability of Access to resources ‘work’

Access to resources (Work)	Functioning	Conversion factor
Gender		X
Owning a car		X
Availability of Public Transportation (PT)		X
Commutes, Roads connections, Quality of roads		X
Checkpoints		X

³⁵ Permission to move about	X	
Active job seeker	X	
Having a driving license		X
Employed / Unemployed	X	
Working conditions		X
Physical condition		X
Social security and benefits		X
Working time/ active desired * (*in terms of quality, breaks, schedule, etc.)		X

According to above table, having a driving license and owning a car are considered personal conversion factors, that can enhance participants capability of access to resources, whereas this capability can be influenced by other conversion factors, related to the social and environmental settings surrounding them, such as the quality of road routes to and from workplaces, quality, and availability of public transportation, the possible Israeli checkpoints on daily route to/from work. The participants in the research sample have shown low conversion levels in these factors, in addition to other social factors such as the need for permission from a male guardian to move about, in the case of the majority of women participants.

³⁵ As Palestine is occupied by Israeli military forces the movement of any Palestinian citizen is restricted and controlled. For the Palestinian citizen to move in territories in order to seek/ go to work he/ she need a permission from the Israeli authority, add to that the fact that in some cases, women, in particular, need another permission from family to be able to go out of her home in the first place.

3.6.1 CAPABILITY OF ACCESS TO RESOURCES (WORK) IN PALESTINE

The gender gap is visible in Palestine; it is manifested in every shared social space, be it public or private (Abdo, N. 2006, Amal, J., 2001; Rought-Brooks, H., Duaibis, S. and Hussain, S., 2010). It also manifests itself through the notable differences between the literature and documentation in institutions and actual implementation on the ground (Abdo, N., 1999). The subject of the labour force and employment in Palestine shows no exception. Protocol of The Ministry of labour in Palestine (MOL), issued in Ramallah on 03/22/2004, states that it is from the Ministry's statute, the pursuit of economic growth and the consolidation of the desired social justice and the liberalization of the productive capacity of women and fully reap the benefits of their work without discrimination (Protocol of Ministry of Labor, 2014). In what follows, the observable evidence shows how these statements are not implemented on the ground.

In the light of Table 2 the employment or unemployment status for women and men is considered a functioning that can be directly influenced by the economic policies applied in the country, as well as other social conversion factors. In the online survey, 66% of women participants said they were unemployed. From a gender perspective, there is an obvious deprivation in this functioning (capability) in Palestine, with a significant gap in the participation rate in the labour force between males and females in Palestine. In the latest statistics available, it reached 71.1% for males compared with 19.6% for females according to the PCBS statistics for the year 2016.

Under the Well Being Gender Budget frame of reference, the development or deprivation of this particular functioning (capability), is interrelated with the development or deprivation of

other capabilities, such as the capability to care for others or care for oneself. The care work provided by women be it unpaid domestic work or care work have a significant influence on the deprivation of their functioning of working, and if this relationship will not be recognized and addressed by new active economic policies, the deprivation status is believed to continue. These facts are usually neglected or overlooked by Palestinian economic policymakers, thus within the WBGB framework, they are encouraged to undertake urgent interventions to improve the situation, such as empowering women enterprises and small projects, providing innovative care services in public spaces, supporting new training and education strategies and so on (Addabbo et al. 2008).

The capability of access to resources can also be shaped by other social and environmental conversion factors, as we can extract from Table 2. For instance working conditions, social policies, working time in terms of breaks and schedule, routes to work, Israeli checkpoints³⁶, and availability of permissions from family or from the Israeli side, all these factors are considered external conversion factors that if correctly intervened and enhanced, will produce a positive effect on the development of this capability for both men and women.

³⁶ According to B'Tselem (The Israeli Information Center for Human Rights in the Occupied Territories) 74 % of the main routes in the West Bank (Palestine) are controlled by checkpoints or blocked entirely. for more information see: http://www.btselem.org/freedom_of_movement

3.6.2 THE PALESTINIAN LABOUR LAW AND RELATED INDICATORS TO THE CAPABILITY OF ACCESS TO RESOURCES (WORK)

The labour legislation in Palestine manifest inequality against working women, in terms of maternity leave, family allowances, and discrimination in the retirement law and social security (ILO, 2009). For example, the Palestinian labour law expands the worker protection plan to include a large number of workers regardless of their gender and to step up and raise the financial compensation the worker is entitled at the end of service or arbitrary dismissal. However, the law still requires the issuance of implementable regulations and bylaws, that includes clear and direct addressing to domestic service and vocational training, were most women actually exercise their occupational lives, as well as adequate regulations in regards to the minimum wage, and the formation of committees for occupational health and safety (Amjad Fadel Zaidat, 2011; ILO, 2016). In the WBGB framework, this regulation deficiency is considered against working women, basically because women hold the responsibility of the well-being of other family members, including the adult man as well as children and older adults (Addabbo et al., 2010).

Both paid and unpaid work, including care work, are considered essential capabilities within this empirical application of the capability approach, however, the role women take as caregivers, may lose its sustainability if maintained unrecognized by the governmental and labour legislations, although it largely affects the women other capabilities of accessing resources or having a paid work.

The Palestinian labour law aims to treat women and men equally; in fact, it appears in text ahead in terms of nondiscrimination in working conditions. In its article number 100, it emphasizes the inadmissibility of discrimination between men and women, stating: “In accordance with this Law and the regulations issued accordingly discrimination between men and women is prohibited.” (Article number (100), Palestinian labour Law, No. 7 of the Year 2000). It also gives special attention women work during pregnancy and prohibits employers from obligating pregnant women workers and employees of conducting hard work tasks, overtime hours, or late night shifts, especially in the first six months after delivery (Article number (101), Palestinian labour Law, No. 7 of the Year 2000).

Nevertheless, the Palestinian labour law does not observe or regulate the work of women or the participation of women in the labour market, and on the contrary, her role was marginalized in this aspect, including her role in the investment market and technical and vocational education. According to The Palestinian Central Bureau of Statistics (PCBS) annual statistics for the year 2016, we can find a huge gender gap in numbers related to both: labour force participation rate and unemployment rate. Labour participation rate for men (15 years and above) in Palestine scored 71.6% for the year 2016, while women participation rate in the labour market for the same year and same age category scored 19.3%, compared to 69.3% and 17.3% for the year 2013, for men and women, respectively. Even though the literacy rate among women aged 15 years is 95.2%, while the men’s literacy rate is 98.6% (PCBS, 2017), the gap in unemployment rates between women and men is dramatically increasing among those with 13 years of education or more. The unemployment rate among women participating in the labour force was 44.7%, compared to 22.2% for males. About half of women with 13 schooling years and above are unemployed, with the unemployment rate

standing at 50.6% of women in this group (PCBS, 2017). Palestinian educated women aim at entering a labour market that is deeply segregated by gender.

In addition, the higher rates of unemployment indicate that even educated women who seek traditional jobs rather than technical ones, still face difficulties to reach such a position. This generates a severe gender segregation in the labour market, in horizontal terms (sectors), but also vertical terms (glass ceiling), that lead Palestinian educated women to have fewer chances than men, in accessing higher positions or technical ones. If we consider the participation rates as indicators of the capability of working, the observed gap by gender in labour supply as expressed in the participation rates will denote a much lower achievement by women. Thus, it is noted that there is no woman acting force in the labour market.

Some other important indicators can explain this gender gap in participation rates in the labour market between men and women in Palestine, for example, the high rates of women participation in the informal care work, the need for permission to move about and thus fewer opportunities in finding jobs. As for the level of education and age, it is imperative to point out that regardless of the age or level of education of women in the MIFTAH study, the low participation in the labour market (paid work), was always linked to high participation in unpaid care work.

Palestinian women believe that there is no equal opportunity in employment between men and women. In a survey conducted by Palestinian initiative for the promotion of global dialogue and Democracy (MIFTAH) and published in 2013, on a gender analysis of the Ministry of labour services, that included 584 respondents, of which 48% were women.

Women in this study seemed confused about their working rights and the services provided by the ministry, because of the prevailing culture in the society and in official institutions, which is not favorable to women. It should be noted that the majority of members of labour unions are men, especially those in decision-making positions (The Palestinian General Federation of Trade Unions (PGFTU), 2017).

Most labour facilities in the West Bank are constituted by men or men and women, with only a few run by women only. It makes sense that men have more appreciation and knowledge of the work and employment situation than women. Employment is defined as a male area. It is thus limiting access for women. The implications of this gender-biased culture are the allocation of specific social and productive roles to each gender while providing them with different rights, and unequal opportunities to access resources. This is also stressed in the difficulties that women face to be recognized as the family providers in official institutions. Such a situation is very confusing for women, as they have to cope with social and cultural constraints while seeking the Ministry's services that maintain them.

For example, the Ministry of Labour, try to emphasize on the open-door policy in its various directorates and programs, both for men and women, but there are still invisible and implicit difficulties within these policies that deprive women of having a real equal opportunity with men, for example in seeking employment services provided by the Ministry, men are treated by default as 'unemployed' and heads of family, unlike women who are seeking the same services, as they need to prove their unemployment status and related responsibilities should be supported by documents, such as a document that proves the absence of a male provider for the family and household (MIFTAH, 2013).

The Ministry and the society at large, keep considering men as the only family providers and heads of households, thus the most eligible for assistance to maintain this role, it considers the public domain as the men natural place, while home or private domain is for women. Hence employment programs always give priority to men, employment as such is considered relevant to men, and a vital thing for men only, as they are seen as the principal breadwinners and providers for women (MIFTAH, 2013), and even in fact 11% of the Palestinian households were actually headed by women in the year 2016, according to PCBS statistics. If the official agencies as the Ministry of Labour, have such biased policies, then defiantly this will lead to higher rates of unemployment for women, particularly with more years of education.

Women in the MIFTAH study expressed dissatisfaction with issues of favoritism and preferential treatment for men; as such, the Ministry's employees contribute to promoting inequality in opportunities in access to resources. Women believe that men have better opportunities in employment, establishing cooperatives, receiving speedy transactions, comfortable movement, and access within departments and directorates, and better staff treatment and understanding (MIFTAH, 2013). Accordingly, the Ministry of Labour structure seems unqualified to deliver gender-oriented services that allow equal opportunity for both men and women. The Ministry maintains a male-dominated mentality, which was prevailed by the unequal treatment of service seekers, in addition to the insufficient number of staff and the gender imbalance. The Palestinian Ministry of Labour is a representation of the male-dominated society in addressing women's employment issues, starting with the gender bias in staff distribution, which was reflected in workplaces and delivered services (MIFTAH, 2013).

In respect to Palestinian woman participation in political life and her representation in the executive authority, it was noted that at the official Post Legislative Council elections of 2006³⁷, the situation was not better than its former, with a proportion of women representation of 12.9% only. Local elections held during 2012 in the West Bank also marked a reduction in the participation of women: whereas women presented their first feminist lists and feminist agendas, they suffered a severe loss. A decline in the presence of women in political parties' lists and independent ones alike was noted as well.

On the other hand, awareness of the importance of women's participation in the executive authority was raised, although there still inadequate and limited involvement of women in decision-making positions, and in some professions such as law, journalism and the judiciary (see Table 3.). In the Palestinian unity government of 2014, only three out of 17 ministers were women: Rula Maaya, Minister of Tourism and Antiquities; Khawla al-Shakhsheer, Minister of Education and Higher Education; and Haifa al-Agha, Minister of Women's Affairs. Political parties bear responsibility for the weakness of women representation in political and public life, as these same political parties lack an adequate representation of women.

³⁷ The last parliamentary elections took place on 25 January 2006. No further elections took place since then as a result of the subsequent split of Hamas and Fatah, the two major Political parties in Palestine.

Table 3. Women and Men employment in Palestine by Job Title, 2016

Job Title	Palestine	
	Women	Men
Judges	17.2%	82,8%
Lawyers	22.5%	77.5%
Public prosecution staff	16.7%	88.3%
Ambassadors	5.8%	94.2%
Engineers	21.1%	78.9%
Director General - Civil sector	11.7%	88.3%
Member of student councils	23.2%	76.8%

Source: PSBC, 2016, translated from Arabic and recreated by the researcher

The culture sector represents one of the areas in which Palestinian women contribute widely, with a participation rate of 84% higher than any other sector, without any official data on formal employment or recognition for such contribution (PSBC, 2016). This contribution includes women artisans who maintain centuries-old traditions, such as embroidery and needlework, straw work and crafts, traditional food recipes that can feed their families all year long. As a matter of fact, these women's efforts are what preserve the Palestinian heritage and popular culture. This is highly critical for an occupied nation, which not only

suffers from land robbery, but also its history, traditions, and culture are being robbed on a daily basis as well.

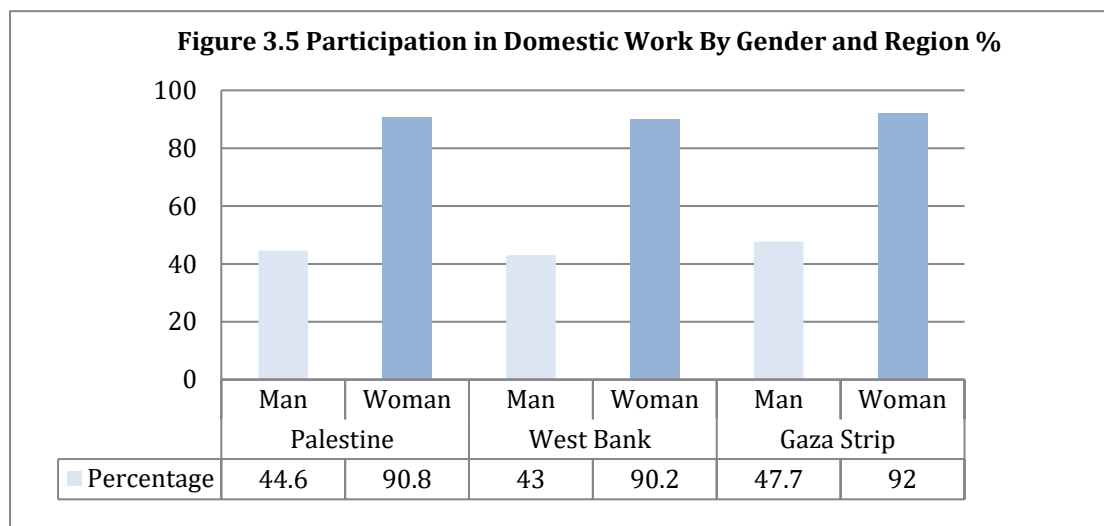
The culture sector in Palestine also includes cultural institutions, such as museums, theatres, media (radio and TV stations, journals and newspapers), and annual festivals. There is a shortage of statistics and studies related to this sector, including a reflection on the size and quality of women's participation in it. Nevertheless, a gender indicator can be found in the percentage of female journalists who work in this field, which does not exceed 26.8%, in spite that statistics indicate that female percentage of journalism students in Palestine is 55%. Moreover, women held only 13% Editor In Chief positions in the West Bank, with no women in this post at all in the Gaza Strip (PCBS, 2016).

The rate of unemployment among educated Palestinian women is dramatically high, a result that is mainly due to a reduced role of women to her reproductive role. Subsequently, women tend to match their education with this reproductive role, by an orientation to specialize in education and services that fit this role, which explains the high rates of unemployment in these sectors (PCBS, 2016). Nevertheless, women attempt to find alternatives, by seeking different services that The Ministry provides, including employment services. Thus, if the Ministry of labour does not take account of the gender bias within its different departments, directorates, programs, and services, and fails to reach appropriately to its target audience, the Palestinian woman will keep incapable of securing a job or being employed.

There is an observed discrimination against women in accessing employment opportunities, as the high rates of unemployed women are coupled with the active search by women for employment opportunities as the survey results point out, while these women are not able to reach the final status of ‘being employed’. As a result, these women are active in the search for jobs, while recorded as inactive in the labour market statistics (PCBS, 2016).

From a gender perspective, it is also relevant to introduce the concept of unpaid work (including care work) and its distribution by gender. According to the first and last time use survey conducted on Palestine for the years 2012/2013, and published by the PCBS in 2015, (see Figure 1), women appear to be more engaged than men in unpaid work activities, for individuals (10 years and above), women spend at 3 hour and 42 minutes in performing unpaid domestic work, while men spend only 34 minutes on same activities.

Figure 1: Participation in Domestic Work in Palestine by Gender and Region



Source: PSBC, 2013 translated from Arabic and recreated by the researcher

In the light of above Figure 1, the fact that women spend many hours in unpaid domestic and care work, reflect a linkage between this indicator and the gendered social reproductive roles assigned to women in the Palestinian society. Gender patterns in time devoted to unpaid care work as such, cut across geographic regions (OECD, 2014). Unpaid care and domestic work are still seen as unquestionable responsibility of women in Palestine as it is across all regions of our world. Thus, if policymakers do not recognize this burden added to women seeking employment opportunities, her capability of accessing resources will be negatively affected, taking into consideration that 49.2% of the Palestinian population are women, i.e., 103.3 men for every 100 women (PCBS, 2016).

In Palestine, 22% of women between the age 20 and 24 years, had gave birth at least once, before the age of 18, with an evident variation by region and mother's level of education, as this percentage is higher in Gaza Strip compared to the West Bank (25.1 percent and 19.6 percent respectively). Mothers with basic education level had a birth before age 18 more than three times compared with those who have higher education, and it is higher among women who reside in low-income families. This pattern increases the burden of unpaid care work on the shoulders of women.

Palestinian women's participation in the economy in general and in the labour market in particular, can be considered a vulnerable participation, compared to global and regional standards, while in the other hand, women participation in the informal and the unpaid domestic economy, as well as in the care economy ranks higher than the participation of Palestinian men in same domains.

3.6.3 LEGAL, INSTITUTIONAL AND POLITICAL FRAMEWORK

Before the year 2012, there was no officially adopted policy on minimum wage in Palestine, despite the negative indicators in the Palestinian society. For instance, more than 150000 citizens were underpaid as numbers from the year 2012 indicate (PSCB, 2012), in addition to high fuel prices, and the increase in the VAT rate from 14.5% to 15% for the same year (European Training Foundation (ETF), 2014). This fact added more economic burden on the Palestinian citizen, while the Ministry was not able or willing to take the needed precautions or changes in the *status quo*. As a result, people took the street demanding the government to change its economic policies, highly encouraged by the famous Arab revolutions in the region, which led the Palestinian government to enact a minimum wage policy (Palestine Economic Policy Research Institute (MAS), 2012).

However, this new policy passed in October 2012, was not refined and applied till the end of year 2013, after protracted negotiations between the Ministry of Labour and the trade and workers unions that were demanding the Ministry to acknowledge the need and form of this new minimum wage policy (ETF, 2014). However, an apparent gender gap can be still found in the average net daily wage of working employees in Palestine. According to 2016 statistics, men receive around 28% higher wages than women, in the same working category, the average net daily wage for men was 32\$, while 23\$ for women.

The Palestinian employment strategy is the result of the sector assessment process involving three parties: the Palestinian National Authority represented by the Ministry of Labour,

labour unions and the private sector represented by the Palestinian Private Sector Coordinating Council. The latest National Employment Strategy covers the years 2014-2016. As clarified previously in this paper, the vision of the Ministry of Labour is to promote a workforce that is responsive to the Palestinian labour market needs.

What the WBGB and the Capability approach provide differently here, is to find the connection - and in some cases the deficiencies - between different legislations, bylaws, and policies from one side, and the beneficiaries' preferences and needs, on the other side. That is by providing a new framework for this evaluation process of the Ministry services. An evaluation process that starts from bottom-to-top opposite to the actual situation in Palestine. The labour market as such should be aligned with people's needs and preferences, not the contrary (Jean-Michel Bonvin & Nicolas Farvaque, 2005).

This evaluation process is based on both provided services and actual results on the ground. This is an important issue concerning the capability of access to resources and work that Bonvin and others (see: Bonvin & Farvaque, 2005), discussed in the context of 'capability of voice' in various occasions. This capability calls for people's effective participation in the design and implementation processes of labour market policies. "In this perspective, payment of social benefits is not enough to guarantee the capability for voice, i.e., the ability to express one's opinions and thoughts and to make them count in the course of public discussion." (Bonvin & Farvaque, 2005, p.270).

Well Being Gender Budgeting, brings into the public discussion, the importance of including both: objective and subjective informational basis, in earlier phases of drafting policies and through implementation and final evaluation process. Such new approach, not only helps in creating ‘tailor-made’ measures as substitute for “standardized programs designed for all members of specific categories such as the unemployed, the disabled, the sick, etc.” (Bonvin & Farvaque, 2005, p.272), but also in shifting from passive to active programs, that aim at increasing the probability of an unemployed in finding employment that fit her capabilities. This, however, does not mean shifting the attention of policymakers away from the context and underlying problems leading to high unemployment rates in a given society, but rather it requires enhancing these policies with personalized interventions, without treating the unemployment problem per se, as an individual one.

In the current Palestinian Ministry of Labour programs, only passive measures are being applied, such as the previous work record of the job seeker, which affects the quality and type of the provided services. While in the suggested active programs under the WBGB framework, the focus will be on the capabilities of job or service seeker, and not her or his current functionings. The focus will be on what she or he is able and willing to do, in order to change her or his current unemployment status, and how the ministry can help in the process, and afterward, the benefits and services will be customized and provided to her or him accordingly (Bonvin & Farvaque, 2005; Addabbo et al. 2010).

In the Ministry of Labour’s strategic plan for the years 2014-2016, it claims to take into consideration, notes, and facts on the failure of the previous plan of 2011-2013 to meet its objectives. However, in the light of previously presented statistics and data, we can observe

some indicators on the inadequate implementation and failure of this new strategic plan as well. This new plan, policies strategic goals, and language were not very different from the former one. Here I recall these goals and policies as mentioned in text within the strategic plan for work sector in Palestine, 2014-2016:

- 1- *Reduce unemployment and promote decent employment opportunities for both sexes in the context of sustainable human development.*
- 2- *Organized and efficient training that flows into the labour market needs of skilled and semi-skilled workers of both sexes.*
- 3- *Organized Cooperatives with significant influence on economic and social growth, among others.*

The adopted policy in the new plan is still the same as in the former, in the text: “developing and implementing the national strategy for employment with participation of all key players” (The strategic plan for work sector in Palestine, 2014-2016). By all means, the Ministry of Labour, tries hard hand in hand with its national and international partners, to enhance and advance the work sector in Palestine; however, it is still gender blind and does not use the adequate approach to reach this end.

3.6.4 GENDER-BASED ANALYSIS OF THE MINISTRY OF LABOUR BUDGET

Within the Palestinian overall budget summary Act 2016, an approved cost of 13,641.201 (NIS³⁸) was detected for a Program titled: *vocational training, employment and cooperation*, which receives 30.4% of the budget allocated to the Ministry of Labour for the same year

³⁸ New Israeli Shekel

(44,833 in thousands NIS) and 0.09% of the total budget of the same year (14,762,121 in thousands NIS).

The stated objective in governmental documents for this program is *compatible and adequate training of local labour that is adapted to local labour market needs, and organizing the work of cooperatives*³⁹ (Palestine budget law, 2016).

In following Table 4. I tracked the different activities of this program and their portions of the assigned budget, while detecting the gender impact of these activities as well as their set objectives and final results. The classification of budgetary programs, according to their gender impact and sexist biases of language, is a basic step for the gender budget auditing process (De Villota et al., 2009).

All programmed activities are classified according to their direct or indirect gender impact that is, defining the explicit or implicit gender impact within these activities. The final result should make us able to decide on the program and its impact on men and women. Program activities that have differentiated impact on women and men, are classified as Programs with Differentiated Impact -PDI, while those that aim at equal opportunities and/or directly and fundamentally have impact on women, when their recipients are mostly women are classified as Programs of Equal Opportunity- PEO, whereas programs that have activities that aim at equal opportunities and/or directly affect women, combined with other activities that have a differentiated impact on women and men, are classified Mixed Programs - MP.

³⁹ All data provided are translated from Arabic by the researcher.

Administrative activities that designed solely for administrative activities transfers management, accounting or similar are classified as (AP), the same classification could be used as well for each activity's objectives or/ and outcomes (De Villota et al. 2009).

Table 4. GB Analysis of the MOL program number (1411)⁴⁰

Vocational training, employment, and cooperation

Program classification according to gender impact	Objective	Related Activity/output	Budget assigned to reach objective	Share % of MOL total budget
Potential Differentiated impact on women and men (PDI)	Building the capacity to provide vocational training for 1790 students (males and females) in 9 vocational training centres in 2016-2017, compared to 1590 students (males and females) who received the training in 2014-2015 distributed at 8 vocational training centres.	<ul style="list-style-type: none"> - 22 Qualified instructors in four professional disciplines. (with no specification of gender) - 10 Vocational training centers equipped with raw materials and ready to receive trainees 	Undefined	NA
		<ul style="list-style-type: none"> - 1390 Students trained and qualified to join the labour market in mid- 2014, and 1590 students enrolled in training (with health insurance) at the beginning of September 2014. (with no gender specification) 		
(PDI) Potential	Improve the classification of Palestinian professional and vocational training according to the	-Preparing 50 trained team members to work in teams to review and rate workshops and training programs.	Undefined	NA

⁴⁰ Table created by the researcher

	Arab union classification.	- 250 Paper and electronic copies are available for the professional classification guide. -printed and distributed booklets in the various governorates of the West Bank on the definition of vocational training centres provided by the government, conditions of admission, and available disciplines.		
(PDI) Potential	To provide services and vocational guidance in the different provinces.	-a project proposal for the establishment and equipping of a vocational training center in the villages of Bethany and Salfit	Undefined	NA
		- 200 Visits to schools scattered in the West Bank, which include vocational training centres for providing description and information on the available vocational training		
(PDI) Potential	Provide guidance services and vocational guidance for the unemployed by increasing the number of vocational guidance quota share to 190 during 2014	Developing the capacity and skills of (15) employee of the operating staff on providing services related to vocational guidance in 2014 (with no gender specification)	Undefined	NA
PDI potential	Provide financial support to encourage the establishment of 60 pilot projects for the next three years	-help 1650 unemployed person to find a job (with no gender specification)	undefined	
PDI potential	Provide evening professional training in 10 vocational training centers	Conducting 12 evening courses at each vocational training center with 3 courses every 3 months	undefined	
	Total Program 1411		15622.827 NIS	33.8%

As Table 4 illustrates, that in the Palestinian budget law (2016) on the mentioned program and related activities and outputs, there is no adequate information that enables us to detect the exact distribution and use of the assigned budget for this program. Moreover, after analyzing this particular program of the Palestinian ministry of labour, it was classified as a **Differentiated gender Impact Program (PDI)**, that means its activities and objectives provide a differentiated impact on women and men, without any certain specification. The problem with such programs lies in its announced objective and thus implementation process and results, which with such absence of gender specification, remain exclusive directed towards men and therefore do not reach the majority of unemployed women, especially those who are not registered as such.

In the capability approach view, it would be more appropriate to shift training programs to respond to the 'local labour' population, thus to real people's needs and capabilities, so to fit in and enrich the local labour market, not the contrary. Moreover, such programs, perceive work only as a macro-political objective, and ignores the need for micro-level assessment, inside the cities, villages and even households, where lies the real reasons why different individuals seek job or employment or keep their unemployment status.

Another problem with the program is the Ministry's inactivity to reach citizens, as raising awareness about its services, through different media outlets, publicity campaigns, and so on. The Ministry states that one of the program objectives, is printing booklets and publications that explain its policies and instructions, regarding the vocational training programs, but facts on the ground prove that this objective was never achieved adequately, neither previously nor in the current strategic plan. The Ministry suffers from 'gender-blindness', which adds up to the shortage in staff, thus resulting in inadequate services all in all.

According to those findings, the Ministry should take into consideration not only increasing the vocational training centers, but also considering the needs of individuals who will benefit from these training programs, according to their gender, spatial distribution and capabilities. Incorporating a gender perspective in those programs imply as well to cease from allocating certain vocational training programs only to women, such as sewing, beauty care, and secretarial studies, etc., which furthers the gender gap in opportunities and specializations, and emphasize the social norms and traditions that limit women to their reproductive social roles only.

In a study published by the Ministry itself, on the linkage between the vocational training and the labour market needs (2015), there is a mention on how the Palestinian labour market needs more vocational training on information technology, installation, and maintenance of networks for males, and on hairdressing, skincare and cosmetics for females. In return, the Ministry could have encouraged men's participation in these training programs, without limiting the participation of women in them. The total number of beneficiaries of the Ministry vocational training centers for the year 2014 according to the same study was 504 (females) 709 (males), without specifying the exact number of beneficiaries in each training program. However, these numbers are considered inadequate to meet the Ministry's objectives, with the current unemployment rates in the country of 22.1% for men compared with 44.7% for women, and controversial to the public announced figures in MOL programs for enhancing employment rates. However, the analysis provided in this regard is limited to the available data and the absence of essential relevant information on numbers of beneficiaries for each vocational training program by gender and exact allocated budget for each of its activities. It is also recommended that the Ministry of Labour, should invest more in raising awareness

about its services and programs, and to use a gender-based language without any bias while outreaching for its beneficiaries.

3.7 FINAL CONCLUSIONS

The public expenditures in Palestine produce a differentiated impact on women and men. It emphasizes the gender inequality problem in accessing resources, leaving women with very limited options towards fulfilling their needs, ambitions, and quality of life that aspire for. This fact is proved by the large gap between the potential capacity of women, and their actual participation in the workforce, presented by officially recorded figures.

This chapter examined the issue by applying a new approach to assess the gender inequality problem in access to resources in Palestine, within the last six years. Namely, the Well Being Gender Budget (WBGB) framework, based on the capability approach. It claims that applying this approach can help us understand better the impact of actual government expenditures, public budget, and related policies, on citizens' well-being and quality of life, in terms of their capabilities. It redirects the attention of decision-makers to the obstacles that limit the full exercise of citizens of their well-being, as it invites governments from the very beginning to focus on what people are actually able to do and to be. As such, it provides a better alternative to monetary-based income metrics approach, that gives distorted and incomplete data in assessing the well-being status and quality of people's lives, as they fail to reflect how traditionally marginalized groups, are to achieve full equality, exclusively in different elements of well-being, including accessing resources, health, education, mobility, and political participation.

The application of the WBGB framework presents a real alternative, especially in terms of inequalities and more specifically, when we think of gender equality, as it looks inside the private space, and takes account of inequalities that women may suffer inside the household, including the subject of unpaid care work (Addabbo, Lanzi and Picchio, 2004). This is particularly important because one of the historical gender inequality concerns is the distribution of unpaid work burden, including domestic and care work, of which women bear the largest share, affecting her own well-being and quality of life (Robeyns 2003, Lewis and Giullari 2005, Addabbo, Lanzi and Picchio 2010).

This new framework takes into account that individuals' perception of well-being, does not only depends on their own personal characteristics but also is highly influenced by other external factors that come from the society, and environment in which they live. On the other hand, people's perception of their own well-being has an enormous effect on their ambitions and aspirations. Thus, for them to be able to realize these different ambitions and aspirations; their capabilities need to be realized first.

Finally, this chapter concludes that it is the responsibility of the society and governments to help to realize and creating these capabilities, by boosting different conversion factors that help to transform resources, into real opportunities. And by adopting new strategies and creating new policies that respond to people's needs.

CHAPTER FOUR: UNPAID CAREGIVING AND ITS IMPACT ON CAREGIVERS CAPABILITIES (QUALITATIVE RESEARCH)

4.1 INTRODUCTION

Development practices in the occupation-torn Palestinian economy often exacerbate certain forms of structural gender inequality, due to a heavy reliance on culturally biased ways of knowing and developing. This fact prevents true gender equality in both private and public spheres, and the development of women's capabilities in general.

This chapter explores this topic analyzing unpaid care work and the fact that women, due to their culturally constructed roles as caregivers and nurturers, tend to carry the heaviest burden of care activities (Julie Nelson 1995; Nancy Folbre 1995; Nancy Fraser 1997). By reflecting on empirical data found during fieldwork, this chapter addresses the issue of unpaid care work in Palestine, making its effects on women's capabilities visible, supported by the voices of women, who helped me learn about their different experiences of unpaid care work during fieldwork.

The chapter contends that while many feminist economic studies have the potential to challenge hierarchies of power and knowledge, there is still a gap matching theory with real-world practice. This claim goes in the context of Global South countries, especially in

complicated settings such as in Palestine, where the ongoing unfair political situation, emphasize socially constructed gender roles. Women in Palestine are the housekeepers and the caregivers, with no real or valid recognition of their efforts, in maintaining the society's well-being.

Through the exploration of fieldwork, I claim that the Capability Approach provides an alternative to mainstream development practices and help promote inclusive well-being policies, including care work. Hence, my theoretical position is grounded in the Capability Approach to understand the complex relation between gender inequality, unpaid care work, people's capabilities, and well-being. In addition, I complement this position with relevant feminist theories on the devaluation of care work and motivations of caregivers that will help break down the relation between gender inequalities in performing care work tasks and the social and cultural norms.

4.2 DEFINING UNPAID CARE WORK

Relevant literature gives us an explicit definition of unpaid care work, as unpaid social reproductive work is done primarily by women, including domestic and care work that contributes to enhancing the well-being of oneself and others. However, for many feminist scholars⁴¹, this generic definition varied to consist of a broad set of activities, such as: household maintenance (cooking, cleaning, and shopping), caring of family members (spouses, children, the disabled, and the elderly), voluntary work in the community, personal

⁴¹ See for example: Diane Elson (2000); Paula England (2005); P. Herd (2002); Debbie Budlender, Debbie and Guy Hewitt, eds., (2002); Tindara Addabbo , Diego Lanzi & Antonella Picchio (2010); Nancy Fraser, (1997); among others.

care (bathing, grooming, and eating), and activities that involve close personal or emotional interaction (Nancy Folbre 2006; M. V. Lee Badgett and Nancy Folbre, 1999; Debbie Budlender, 2010; Shahra Razavi 2011).

As such, the debate on unpaid care work in feminist literature, is pivoted on a descriptive approach to developing a desegregate definition entailing an in-depth analysis on who benefits from this work, where it is being provided, and what type of activities does it include (Nancy Folbre 2006; Debbie Budlender 2010; Shahra Razavi 2011).

However, there is no dispute on the fact that women carry out the largest block of it, and that it remains undervalued and widely unrecognized (Martha Nussbaum 1995; Nancy Fraser 1997; Diane Elson 2008). In an OECD paper on unpaid care work Ferrant, G., Maria Pesando, L. and Nowacka, K. (2014, p.3), break down this definition to three basic components:

“**Unpaid:** the individual performing this activity is not remunerated, **Care:** an activity provides what is necessary for the health, well-being, maintenance, and protection of someone or something, **Work:** the activity involves mental or physical effort and is costly in terms of time resources.”

4.3 GENDER INEQUALITY IN UNPAID CARE WORK

Gender inequality is a core issue while examining the subject of unpaid care work, as they are women who conduct the largest share of it across all nations and cultures with no exception (Diane Elson 2002; Paula England 2005; Nancy Folbre 2006; Debbie Budlender 2010). Social and cultural norms are still a barrier to value women’s unpaid care work. In fact, they enforce the deprivation of women from practicing their full capabilities (Amartya Sen 1987).

Implications of care work on paid employment and vice versa and their different impacts on women and men are often neglected in human development policies and well-being theories (D. E. Bubeck 1995; Eva F. Kittay 1999; Susan Himmelweit 2000; Nancy Folbre 2001). With roots in liberal feminism, socialist feminism, and postcolonial feminism, feminist scholars have tried to make this impact visible, creating a more just society, where ideally, men and women equally share the care responsibilities, without reducing their opportunities of access to the labour market (Susan Okin 1989; Nancy Folbre 1994; Ingrid Robeyns 2001).

To understand the multiple oppressions related to and reinforcing each other, allowing the final result of women being the majority of community's caregivers, feminist political economy at its core goes beyond gender discrimination in conducting care responsibilities that usually lay on women shoulder, to include other forms of societal oppressions – racism, ageism, classism, heterosexism, and ethnocentrism, among others (Teresa Amott and Julie Matthaei 1991; Judith Lorber 1991). In this sense, the feminist economy seeks to uncover the underlying dynamics behind the dominance of male over female, as well as Western over non-Western cultures, to better comprehend the various expressions of patriarchal culture with its hierarchical forms. As such, unpaid care work cannot be seen in isolation from gender conflicts in the division of labour, or the aforementioned multiple shapes of oppressions, that women, as caregivers, face.

Women's contribution to the economy are backed by their extraordinary share of unpaid care work, and this often affects their ability to participate in the labour market, yet this contribution maintains masked and unrecognized (James Heintz, 2006). Numbers show that women allocate twice the amount of time to care work inside the household that men spend on the same activities (Esther Duflo, 2012). This issue is at the heart of gender conflict in the

division of labour that persists in women's work to be underpaid and mostly undervalued (Katrina Honeyman and Jordan Goodman, 1991).

Worldwide, in heterosexual households, and regardless of the employment status of both partners, women spend at least 2 hours and a half more than men on domestic and care work, on a daily basis (DeAnne Aguirre et al. 2012).

As we discussed at large in the previous chapter, in Palestine, women's participation in the informal economy, including unpaid care and domestic work, ranks higher than the participation of Palestinian men in the same domains. According to Palestinian Central Bureau of Statistics (PCBS 2016), women spend more than 6 hours in domestic and care work, while men spend less than two hours on the same tasks. Women literally form half of the Palestinian society. The estimated Palestinian population at the end of the year 2015 was 4.75 million, of which 2.34 million are women, with a percentage of 49.2 percent of the total number of inhabitants (PCBS 2016). Moreover, married women account for more than half of this figure. The percentage of married females aged 15 years was over 56.1 percent in 2015, while about the fifth of these married women aged 20-24 years gave birth at least once, before the age of eighteen.

It should be noted, as discussed at large in the previous chapter, that women's unemployment rate was higher among those with 13 years of schooling and above, standing at 50.6 percent (PCBS, 2017). If we consider the participation rates as indicators of the capability of working, the observed gap by gender in labour supply as expressed in the participation rates will denote a much lower achievement by women for this capability. In the same context, the percentage of women reported as an unpaid family member was 11.7 percent, while men rate

in the same category was 3.1 percent only. Stunning enough to know what proportion of women reporting renouncing participation in the labour market, due to their housekeeping activities is 62.6 percent, with no observations made at all for men in this same category (PCBS, 2016).

A vital aspect of the feminist analysis of unequal opportunities built on gender bias and of socially constructed power relations involve the women's participation in the paid labour market, an arena historically monopolized by men (Betty Friedan 1963, Gary Becker 1985; Francine D. Blau, Marianne A. Ferber and Anne E. Winkler 2006). In the same context, feminist have also argued gender division in the labour market goes beyond this analysis to include the socially constructed differences and inequalities, in our current classist, racist and sexist economy rather than being an issue of pure free choice for women (Teresa Amott and Julie A. Matthaei, 1991).

The issue of care work has become a major topic in feminist literature and feminist economic perspectives, which insist in moving toward the recognition of the important burden of care and how it has being misread in economic traditions only based monetary value (Amaia Pérez Orozo, 2014). Care is a basic requirement for the sustainability of life and, therefore a collective responsibility unequally distributed worldwide under the lines of gender, class, race and Global North-Global South oppressive dynamics (Pérez Orozo, 2014). Very often for those more affluent women the care imperative is being partially avoided by monetarizing it and transferring it to other poorer, racialized, migrant women in what is known as *global chains of care* (Pérez Orozo, 2014).

Global chains of care, as the caring burden of the working women with better resources and

education is displaced to other women whose care work became “labour”, and thus paid, yet under severe precariousness and poor working conditions. At the same time, their own “caring imperatives” are also displaced to other women, -family members, friends-, sometimes in transnational arrangements of care where some women’s care for the children of an affluent family in the Global North whereas their own children are being cared for in their countries of origin in the Global South by other women. However, care work still seem to be understood as a female obligation, and males do not share the burden of care required for the collective sustainability of life (Pérez Orozo, 2014).

In Global North countries, there have been reforms in social policies aiming at increasing women’s participation in the labour market. The question is if this new approach really addresses the gender inequality problem in care work, or does it create real opportunities for women’s participation in the paid work (Jane Lewis and Susanna Giullari 2005; Mary Daly 2011). If we look at Europe, we will see how is it mostly women not men, the ones who choose part-time jobs or they stay home to take care of children, because formal and informal care services are either not of high quality, or too expensive (Jane Lewis and Susanna Giullari 2005; Nancy Folbre 2006; Mary Daly 2011). In addition, most care jobs are occupied by women, and still underpaid than other jobs, which make women keep suffering a big gender pay-gap (Trond Petersen and Laurie A. Morgan 1995; Paula England 2005). Women in Palestine also, try to match work with their gender productive roles, as the majority of Palestinian women work in the service sector (including health, education, and public sector). As such, the services sector comprises the principal employer of women, accounting for 62.9 percent of the total number of women workers.

Women may occupy care work for two fundamental reasons: first, because they have the

needed skills, and second because its returns are highly valuable to them. In the case of Palestine, these types of jobs are more socially acceptable than others. However, women caring skills are not well valued, and returns of their work cannot be easily transformed into tangible economic value -as it is traditionally measured-; thus women care work in general, be it paid or unpaid, remains undervalued⁴² .

Nancy Folbre (1995, p. 76) tackles the inputs rather than the outputs of the caring process. Thus she discusses motivations for care work to understand why it has been and still undervalued, despite its unquestioned contribution to the well-being of society. She argues that three motives usually direct caring that include a giver and a receiver as an exchange process: reciprocity, altruism, and responsibility. *Reciprocity* implies the presence of certain expectations and rewards, that caregiver conceives as a result of the act of caring. Hence, the nature of these expectations or rewards depends on the personal preferences of the caregiver, which affects the quality of the delivered care work. While *altruism*, does not include such expectations or rewards, it is related to the set of feelings that the caregiver generates as a result of adding to the well-being of another person. This perspective tackles altruism, as a motivation for care work, and conceptualize its relation to penalties and low rewards received by persons who conduct it (Nancy Folbre 2001; Paula England 2005).

Folbre (1995, p.77) also makes a case for obligation or *responsibility* as a motivation for caring, which is more related to cultural values and social norms. However, according to her, the three motivations are “interrelated and also difficult to distinguish” (Folbre, 1995, p.77),

⁴² (Paula England and Nancy Folbre 1999; Cancian and Oliner 2000; Paula England, Michelle Budig and Nancy Folbre 2002; Paula England, 2005).

and can be affected by social and cultural norms, as well as by personal preferences and values.

But women are not vulnerable to those norms by nature; they are imprisoned by gender roles forced on them. This notion also opens the door for the lengthy discussion in the literature, on whether care work is undervalued because caring is women's specialty, or that "women's work, in general, is undervalued" (Nancy Folbre, 1995, p.79).

Actions have little to say about preferences. If women would have real freedom of choice in their actions, then perhaps we could learn more about their preferences (Folbre 1995; Lewis & Giullari 2005). Women are born and grown up in institutions (family and society) that convince them that their role in life is to give care and that they should seek the fulfillment of this role, and moreover, to feel good about it (Folbre, 1995). Hence, women will not seek equality if they fear for the well-being of the ones they care for (child, parent, and so forth) (Folbre, 2006). Thus, the state is an institution that plays a significant role in interrupting this process of creating preferences, by implementing policies that respond to people's needs (Picchio 2005; Addabbo, Lanzi and Picchio 2010; Shahrā Razavi 2011). This role implies as well, making visible the cost (burden) and reward of care work (Folbre, 2006). The state failure to respond to those issues tends to reinforce gender roles in society and to perpetuate women as the only caregivers.

For example, in a global North Country, families may not hesitate to put their elderly in a residential care home, not because they care less for them, but rather because they trust the social services, protected by social policy. While on the contrary, that confidence is broken in a state with no welfare system, and then, the care for the elderly will be provided at home,

essentially by women (Lewis & Giullari, 2005). More attention of scholars and policy-makers for the question of care is noticed in developed countries than in the developing ones (Debbie Budlender, 2010). Thus the issue was analyzed and examined at many different levels in the developed context, and different models were discussed and applied to address it (Shahra Razavi, 2011).

In both cases, even social policies, including family and care policies, were formed to reach straight economic goals, such as increasing the labour force rate and efficiency and sustain competition, rather than enhancing the actual well-being of citizens (Nancy Folbre 1995; Nancy Folbre and Julie Nelson 2000; Jane Lewis and Susanna Giullari 2005). Policies in developed countries are pushing care work away from families and the household, converting it to a pure commodity (Nancy Folbre 2006; Jane Lewis and Susanna Giullari 2005). On the other hand, in developing countries, kinship and social network solidarity play a significant role in providing care to the ones who need it. Hence, the previous shift in care policies cannot be applied in the global South context, without proper examination (Shahra Razavi 2011; Nancy Folbre 2006).

Transferring care work from an informal domain (the household) to a formal one (market and public social services) is not always possible (Nancy Fraser 1987; Jane Lewis and Susanna Giullari 2005; Nancy Folbre 2006; Shahra Razavi 2011). Even in the most developed countries, many low-income families cannot afford to pay care services or have no access to public ones (Shahra Razavi 2011; Nancy Folbre 2006).

Until inequalities in care work would be accurately addressed, women will stay the majority of caregivers' population across the world countries, with no exceptions (Shahra Razavi,

2011). Studying gender inequalities and intra-family conflicts experienced inside the household is critical here, to understand how women gained this position (Nancy Folbre, 2006). Policies should not use neutral language and assume that both men and women are workers by nature. Women should have the choice to care or not, as well should men, without either of them being economically or socially penalized, as a result of this choice (Nancy Folbre 1995; Jane Lewis and Susanna Giullari 2005).

4.4 THEORETICAL AND NORMATIVE FRAMEWORK

Caregivers and especially women, ensure that care recipients are functioning well in society, directly and indirectly through different developmental stages in lives: babies, children, ill and chronically ill people, disabled people, adolescents, adults, and elderly people. However, caregivers themselves are believed to endure more well-being deprivations than non-caregivers. In addition to financial vulnerability, they also enjoy fewer educational and training opportunities, which results in more potential dependency (Greta Friedemann-Sánchez and Joan M. Griffin, 2013).

Sen's capabilities approach, -later developed with the contribution of Martha Nussbaum (Martha Nussbaum and Amartya Sen 1993; Martha Nussbaum 1999, 2000, and 2003)-, emphasizes on the real freedom of choice available for women and men in certain social contexts to be and to do what they consider valuable and the impact of these decisions in their living practices (Antonella Picchio 2005; Tindara Addabbo, Diego Lanzi, and Antonella Picchio 2010). The capability approach framework helps build a basis for the recognition and valuing of care work as it provides critical attention to the gender inequality problem in

caregiving. Both Sen and Nussbaum, point out the role of the state and policies to underpin the space of freedom in promoting human development and social change (Tindara Addabbo, Diego Lanzi, and Antonella Picchio, 2010).

The capability approach suggests that valuing individual well-being, should be defined in terms of what Sen calls the *capabilities set*, which “represents the freedom that a person has regarding available functionings given his personal features and his command over resources” (Amartya Sen, 1985, p. 13). Hence, this evaluating framework of well-being presents a rich space for assessing the impact of care work on women’s well-being and their life quality. Sen specifically address gender inequality through his approach: he argues that shifting the focus to people, the comparison process between capabilities (aspired states of beings and doings) and *functionings* (what people are actually able to do and be in real life), can give us a better understanding of the inequality problem in gender (Amartya Sen 1992; Martha Nussbaum 2000; Ingrid Robeyns 2003).

Shifting the focus, and introducing gender perspective in the measurement of well-being, is relevant here, as it enables us to know how women and men in a given societal context are enhancing their well-being, and what are the different roles each plays to improve the well-being of the other. The capability approach takes account of these various roles and impacts on the well-being, led by women and men, but women in particular, as they hold these social reproduction roles in society (Antonella Picchio, 2003).

In the same context, reproductive roles assigned to women create gender inequality in the distribution and access to resources that public policies and expenditures fail to detect. Women’s unpaid care work has a direct impact on the well-being of other society members,

which has interactive effects on public budget and delivered public services (Diane Elson, 1998). Initiatives of gender mainstreaming in policy and budgeting; hence gender budgeting, try to address this issue accounting for the contribution of unpaid care work in the gross national product (Debbie Budlender and Guy Hewitt 2002).

Ingrid Robeyns (2003, p. 67-69) presents a normative evaluation framework of well-being assessing gender inequality through the capability approach. According to her and as I have discussed in previous chapters, the capability approach has significant advantages when tackling gender inequality in the economic context and policies.

When interpreting well-being from a gender perspective, the capability approach refuses the pretended gender neutrality in modern economics, where family is used as a singular unit when assessing expenditures and collecting relevant data for well-being in the household (Elisabetta Addis, 2010).

4.5 CAPABILITIES SELECTION PROCESS

In the relevant literature, there are several methods towards the selection process of capabilities. Martha Nussbaum (2000), for example, developed a version of a universal list of capabilities, as I have mentioned in previous chapters. Other scholars such as Sabina Alkire and Rufus Black (1997), Ingrid Robeyns (2003), Tindara Addabbo, Diego Lanzi & Antonella Picchio (2010), preferred to create their own lists of capabilities. I have already stated at large my disagreement with Nussbaum's universal list of capabilities; therefore, I used the second approach as a model for creating a particular list of capabilities for Palestine. This chapter is

concerned about presenting a gender assessment of unpaid care work and its implications on people's well-being. In particular, unpaid care directed to frail elderly family members, an issue that is usually overlooked, in health and well-being related policies.

To describe the nature of unpaid care directed to frail elderly family members, I build on the previously introduced definition of unpaid care work, and narrow it to include the following care activities, as desegregated from the International Classification of Activities for Time-Use (ICATUS, 2016)⁴³:

- Accompanying adults to receive medical/health services
- Giving personal care to adults
- Giving medical/healthcare to adults
- Caring for adults/emotional support

Hence, I will discuss relevant capabilities, selected for their relevance to the context under study from Ingrid Robeyns (2003) and Tindara Addabbo, Diego Lanzi & Antonella Picchio (2010) lists of capabilities, as both proposed lists claim to facilitate such assessment with a feminist perspective and in accordance with discussions held during my fieldwork and different stays in Palestine. In what follows, I list and describe these capabilities:

- | | |
|----------------------------------|--|
| 1. Living a healthy life: | <i>to live healthy, normal length life, physically and mentally, including reproductive health, and being adequately nourished.</i> |
| 2. Accessing resources: | <i>being able to access public and private resources, being able to work and access labour market and to do projects, as well as being able to receive support for one's projects, that may have a positive effect on society.</i> |

⁴³ All Classified as classes or subclasses of the Major Division: number 07 - Providing unpaid caregiving services to household members

- 3. Caring for others:** *to be able to take care of dependents (children, elderly, etc.) in one's family, and showing concern for others in society (do voluntary work). Being able to live with and toward others, to engage in various forms of social interaction.*
- 4. Caring for oneself:** *being able to take care of one's body and mind, such as in having opportunities for sexual satisfaction and choice in matters of reproduction.*
- 5. Autonomy over time:** *being able to allocate one's time upon one's needs and satisfaction with no imposed external interrupt.*

4.6 METHODOLOGY

The fieldwork analyzed in this chapter was conducted from April 6 to May 6, 2015, aiming at detecting invisible work or unpaid caregiving performed by family members accompanying older adults (within the age group 60 years and above) in Palestinian public hospitals. The fieldwork used qualitative research techniques of ethnography and in-deep interviews, to document and collect experiences of people accompanying their elderly relatives in public hospitals in the West Bank – Palestine. Specifically, semi-structured interviews and field observations were used to collect needed data.

In a research with a feminist perspective, as in the case of this Ph.D. project, removing the power imbalance between the researcher and the participant is a crucial issue: it considers participants the experts on topics related to their own lives and experiences (Jennifer Brayton, 1997), and, as researchers in the feminist tradition, take it on themselves to bring an end to the oppression of specific populations, i.e., women (Patricia Maguire, 1987). As such, the researcher should redistribute ownership of the research project with the participants (Diane

Wolf, 1996). Accordingly, in this fieldwork the creation of the friendly and confidential environment was supported by unstructured, informal, anti-authoritarian, low-hierarchical relationships, aiming at reducing power imbalances between the researcher (interviewer) and the participants (interviewees).

In this fieldwork, I tried to be careful to avoid involving personal influences on the collected data as well as not underestimate the impact of participants on its quality. Hence, interviewees' stories were fully heard and not only recorded. The fact that I am a native and I speak the same language as the interviewees, and that I also was a caring person for my own mother helped to build up mutual trust and understanding, as it allowed me to step in the shoes of my interviewees. Respectively, I used terminology that was close to them and their social/ cultural/ religious backgrounds. To be able to do that, I spent hours in hospitals observing, recording, and documenting real-time experiences of fieldwork participants in caregiving.

Fieldwork aimed at collecting people's stories and personal experiences in care work, to help to learn about connections between unpaid work in caregiving, and effects on caregivers' well-being and selected capabilities. Fieldwork focused on public hospitals serving Palestinian citizens in the inner - middle to middle-southern regions, including the following Palestinian cities: Ramallah, Jericho, Bethlehem, Hebron, and suburbia. These geographical areas include the major public hospitals in the West Bank, regarding patient ratio and beds ratio. To collect testimonies about everyday caregiving experiences, I approached more than thirty people. Twenty-three gave me an oral or written consent to voice-record their interviews and use their informed stories in this study. Interviews were distributed as follows: ten interviews at Beit Jala Governmental Hospital (Al Hussein), five interviews at the

Hospital of Jericho, and lastly eight interviews were conducted at the Palestinian Medical Complex (PMC) in Ramallah, which consists of three hospitals (Ramallah Public Hospital, Al-Sheikh Zayed Hospital, and National Center for Blood Diseases - Hippocrates).

The age among inpatients ranges from 60 years old the youngest to 105 years the oldest. Ten were men with an age average of 70, and thirteen were women with an age average of 72 years. The twenty-three caregivers ranged in age from 17 to 85; five of them were men while the rest were women. Some of them were illiterate, while others had bachelor's degrees, and one was pursuing his Master's degree. The range of professions was wide: teachers, housewives, nurses, students, and even women pensioners belonging to the elderly social group themselves.

4.6.1 SOME EMERGING PROBLEMS DURING FIELDWORK

By large, this fieldwork was successful, and it reached its objectives. However, some problems emerged during its execution. For instance, on the first day of fieldwork at Al Hussein hospital, some people that I approached refused to be interviewed. People usually do not feel confident to talk about their lives and personal stories with a stranger. It took me some time to build up trust and confidence between the hospital community and myself, to start the fieldwork.

Moreover, after spending several hours at a hospital, people usually started to be familiar with my presence, and later on some even approached me themselves to be interviewed, however I had to politely let down people whose profiles do not fit into the research criteria,

while explaining to them, the purpose of the research. In one case, the inpatient (the husband), had to permit his caregiver (the wife), to be interviewed; such an incident can be understood within the patriarchal Palestinian social context. In another event, at the PMC when I approached the family member accompanying an elderly inpatient (later I knew she was the wife), the inpatient was verbally aggressive with me, and banned her from talking to me at all, even before I was able to explain what I was doing or what I want to do. I can relate this incident to the unstable psychological status that the patient might have been suffering while at the hospital and on medicines, a thing that may affect his logical judgment on unusual occurring events.

Furthermore, the limitations and strengths of the fieldwork can be found in a more detailed way in the following section.

4.6.2 LIMITATIONS AND CHALLENGES OF THE FIELDWORK

The research faced many challenges concerning fieldwork and interviewed people. From which I list the following:

- Commuting between middle and middle-southern cities: Ramallah, Jericho, Bethlehem, Hebron was not easy because of the permanent presence of Israeli military checkpoints; a regular 30 to 40 minutes' drive between each of mentioned cities was sometimes taking 2 or 3 hours at best.

- Having access to a governmental building such as public hospitals needs a facilitation letter from the Ministry of Health, a process that consumed a lot of the scheduled time for

conducting the fieldwork, not to mention the high bureaucracy at each hospital, in one occasion I was confronted with an obvious notion on a patriarchal culture that controls public hospitals, while one of the hospital managerial directors, actually was not convinced by the motive of my visit and my research, and only allowed me to enter because I had a letter from the Ministry of Health.

- Almost in all cases, except in the PMC in Ramallah, I had to be accompanied by one of the hospital managerial employees, while talking to people and conducting the interviews, a thing that I believe did not make people comfortable enough to give a lot of details about their experiences and daily lives in hospitals.

Study Sample Limitations and Challenges:

- In Jericho public hospital it was easier than other hospitals, to interview people, where nobody I have approached, refused to be interviewed, I associate that with the small size of this hospital (it has less than 50 beds serving internal medicine inpatients) and the special attention that the hospital management gave for my work and research.
- On the contrary, at the PMC, many people refused to be interviewed, despite the fact this medical complex considered the biggest in Palestine. It was indeed hectic, in the time of conducting the fieldwork, even I have visited it within different time intervals.
- In some cases, many relatives were surrounding the inpatient, and I had to spend many hours with a family to figure out the real caregiver identity.
- The Palestinian community is conservative in general, hence although people seeking the public health services are coming from different socio-economic and even cultural

backgrounds (nomads in one case), and religious (five interviewees were Christians) the interviewees almost in all cases, did not provide much details on the care work they provide for patients in households, or exact reasons behind their nomination to accompanying the inpatient, from the rest of family members.

4.6.3 FIELDWORK STRENGTH AND WEAKNESSES

Semi-structured interviews are a research method that gives the interviewee the space to express and talk about her/his own experience and observations. It also includes storytelling about other people's experiences/roles during the care daily activities (Berg, 1989). Therefore, the caregivers provided this research with details about everyday life care work activities, in the household and hospitals. In addition, the fieldwork provided an opportunity for people to elaborate on their experiences and practices as well as narrating what kind of care work they do during their stay at the three public hospitals. The semi-structured interviews allowed generating rich data from interviewees; the (body) language used by participants was an essential tool in gaining insight into their perceptions, experiences, and values.

Moreover, an evident strength of the study was the diverse range of respondents in terms of gender, age, location, socioeconomic group, cultural and religious background, in addition to including reflections and opinions of public health service providers and experts. Talking and interacting with different individuals who belong to the various segments of MOHs services cycle, from management (government) to service recipient (citizen), enabled me to have the perfect settings for knowledge landscape (Jean Clandinin and F.Michael Connelly, 2000), and to explore and analyze the various perspectives and conflicted points of views.

WEAKNESSES:

The caregivers were talking about their experiences from their perspective and point of view. They expressed how they perceived their care activities during their stay at hospitals; however, for some of the caregivers, it was not easy to talk about their care activities inside the households or to track the exact number of hours they spend in the caregiving work.

Further, due to lack of relevant literature, the twenty-three interviewees were the primary available source of data to learn about people's perception of the care work provided by accompanying persons to elderly patients in Palestinian public hospitals and managing these public hospitals services.

4.6.4 DATA COLLECTION (TOOLS AND PROCESS)

The purpose of the qualitative research is to explore the views, experiences, beliefs, and motivations of individuals on specific matters (Sharan B. Merriam, 2009), in this research case, factors that influence their nomination to be the caregivers for their sick relative. Qualitative methods, such as interviews, are believed to provide a 'deeper' understanding of social phenomena than would be obtained from purely quantitative methods, such as questionnaires (David Silverman, 2000). Therefore, interviews are most appropriate, where little is already known about the study phenomenon or where detailed insights are required from individual participants. They are also particularly relevant for exploring sensitive topics, where participants may not want to talk about such issues in a group environment. Hence, this research used qualitative methods for collecting relevant data and interpretations (Berg, 1989).

It was intended that a range of qualitative data collecting instruments such as Focus Group Interviewing and One-to-One Interviewing would be reviewed and evaluated (Berg, 1989; Britten, 1999). The aim was to develop the most suitable instrument that could be used to ensure reliability and validity when assessing the well-being and capabilities of participants, and ultimately to identify the type of caregiving burden they bear.

In addition, drawing upon the work of Sánchez and Griffin (2013), a second instrument was to be developed (field observations) to enrich oral interventions with my own observations in the field. It was envisaged that in using these instruments, a baseline assessment of well-being would be produced upon arrival in the field and then one month after, the assessment was to be repeated to evaluate how the experience of participants as caregivers had influenced their well-being. In doing so the main approach was to see if there were critical points during the process that instigated negative well-being indicators for the caregivers.

It was not long into the research and literature search that I felt that the focus group approach was unsuitable for several reasons. Firstly, the usefulness of such an approach to collect credible information was felt to be limited. Although the results of the focus group interviews might in themselves be valuable as an ‘indicator’, it was thought that this was a move towards explaining the distress of caregiving rather than understanding the complex process of caregiver nomination. Secondly, as Berg (1989) highlights, the use of focus groups in socio-cultural research may result in methodological issues such as construct or item bias.

Finally, it became increasingly apparent that I was taking a problem-based approach to well-being (Rex Stainton-Rogers, 1995): taking as a starting point that caregivers were not socially and economically functioning particularly well; secondly they were experiencing negative

psychosocial well-being; and finally, that this was somehow a homogenous group in 'need'. Thus, one-to-one interviews were a more appropriate approach to handling all these mentioned issues. Accordingly, semi-structured interviews were the primary tool to obtain data on the experiences and practices of receiving the Ministry of Health services.

Observations of fieldwork sites (hospitals and specialized hospitals) were used to analyze the characteristics of the specified program for second and third level health care services (Berg, 1989).

Another reason for collecting qualitative data (qualitative interviews and field observations) and not quantitative one was to get real-time and detailed stories from the participants, from the defined target group. I voice-recorded the interviews since open-ended questions, and in-depth discussions were often witnessed, and a record for all raised issues should be kept. Transcripts of recorded interviews were written and then analyzed (Berg, 1989).

PROCESS:

The semi-structured interviews included several key thematic questions to cover the subjects I wanted to explore, but at the same time that allows me to modify, to follow up a certain idea or response in a detailed way (Berg, 1989; Britten, 1999). This approach is usually used in researches related to healthcare because, in addition to its flexibility, it helps the researcher to elaborate on information that is considered important for participants but may not have been thought about before when setting the primary interview questions.

Regarding the interview design, several visits were done to each hospital to define the target group and to schedule interviews with selected participants, as well as defining field settings and determinants of the place. Pre-interviews meetings were held with each hospital management, and visits for targeted wards were conducted to allow and facilitate the fieldwork, as well as post-interviews were conducted with several public health experts to reflect upon and make sense of collected data.

While interviewing the caregivers, the primary (icebreaker) interview questions, were direct, neutral and understandable to build up a friendly atmosphere and trust with participants, in order to enable me to proceed with more profound and open-ended questions on more sensitive subjects, a thing that helped further development of each interview, respectively. The length of each interview varied according to interviewees' answers and psychosocial impact of opened topics, as well as emerged issues such as eating time, outside interrupts, the health situation of the patient, medical check-ups or medication times.

Among the many factors that can influence the number of interviews a researcher may conduct, are those factors related to geographical and resourcing limitations, of which specifically I have spoken openly in this research. Nevertheless, in the first stage of fieldwork, I reviewed each conducted interview on a daily basis, before continuing to conduct new interviews. I kept doing this, till I reached a 'saturation' point, or as better known in the grounded theory literature a "saturation of knowledge" (Daniel Bertaux 1981, p. 37). At the first stage, in the first few interviews, I gathered a lot of interesting information, and learned a lot from the participants and their life experiences at the hospitals, by time I was able to notice certain patterns in the interviewees' experiences, and was able to distinguish particular behaviors and attitudes, and the usage of specific terminology. Further, the subsequent

interviews confirmed my saturation of knowledge sensation (Bertaux, 1981). Thus, at the end of the transcribing and analyzing the content of the twenty-third interview, I decided to stop conducting any new ones.

In this fieldwork, I managed to gather personal experiences at public hospitals from twenty-four caregivers and got the consents to voice-record twenty-three interviews among them. I determined to stop conducting more interviews, as I soon as I collected enough information on the basis of this research purposes and objectives in addition to making feasible the available resources for this research in terms of time and money.

The data was collected through voice recording software and written notes. To analyze the information that was collected through the semi-structural interviews, first, I transcribed the recordings and re-read the notes made during the interviews. Second, I identified and wrote down the main themes that emerged during interviews while listening to the recordings. Third, the information gathered was classified based on the analytical framework adopted by this research, linked with the topics discussed with the respondents during the interviews. Finally, the interviews were categorized to identify the main ideas expressed for each topic and to select the most relevant and important points, as it follows in the next sections.

4.7 DATA ANALYSIS

Conceptualizing the unpaid care work in the Palestinian context as derived from reviewed literature, as well as participants responses, includes to the following themes: family caregiving and cultural values, caregiving as an unquestionable responsibility of women,

examining the caregiving nomination process, intra-house conflict, the caregiving burden and finally the possible measurement of caregiving implications on the well-being of caregivers and their quality of life, from the capability approach perspective.

4.7.1 LEGAL AND INSTITUTIONAL FRAMEWORK

The empirical evidence from fieldwork shows that what matters for the majority of people in the Palestinian community, and even more for older adults, is primary health care, i.e., the availability of clinics for treatment and medical revisions, to get medicines, or to conduct lab tests, and so forth. These public health centers and clinics feature plenty of underlying problems in the Palestinian primary health care system (Adel Mahmoud, 2013). Those issues include, but not limited to:

- 1- Huge number of revisers and patients;
- 2- Disorganization, lack of order or clear regulations;
- 3- Inability to see a doctor or to get medical treatment after waiting many hours.

Palestinian citizens have the right to access public healthcare, insured by the social security system (The Palestinian Public Health Law, No. (20) Art. (3) Section (5), the year 2004). However, this health system is not universal, and people have to pay a monthly contribution to benefit from it. These contributions are usually reduced for the unemployed. Nevertheless, given all reasons mentioned above, elderly Palestinian citizens may not be able to find the health care they need, whether for free or cheap adjusted prices; thus the majority still need to receive care at home. In public health installations, a Palestinian elderly patient rarely receives adequate treatment and access to required information is not easy (Adel Mahmoud 2013).

An important note on the work strategy of the Ministry of Health is the change of Minister of Health three times in five years (between 2006/2007 and 2012/2013), due to political unrest, split of administration and several government changes. Hence, these changes led to chaotic decisions inside the ministry, such as the change of Palestinian Three-year National Health Strategy with each replacement of the Health Minister, without fully implementing previous plans, or assessing its results and implications.

4.7.2 FAMILY CAREGIVING AND CULTURAL VALUES

The women caregivers I encountered in fieldwork were wives, sisters, daughters, or daughters in law. In all cases, the women caregivers, in describing their life activities outside the hospital, said that they would also be taking care of their elderly relatives, doing domestic work, or taking care of children. They give priority to taking care of the family and consider it their duty and responsibility.

Palestinian woman tends to be the principal caregivers in their family house if not married, and then they will carry this role to their husband's family house, once they get married. In one case when the caregiver was the wife of the patient when asked who takes care of him at home, she confirmed that she did and added: "my daughters are married, that is why they cannot help, but my daughter in law is helping me." In more than one case, when the caregiver was the wife, the patients, their husbands, tried to sign the consent form instead of them or sought to direct them how to answer my questions. In many cases, I had to hold the interview in a new place, away from the sight of the patient/ husband, to avoid such incidents.

Out of the four cases where the caregiver was a man, only in one the caregiver –a son– said he would also be taking care of his mother while she was at home. The three other cases referred this role to the wife, daughters, or daughters in law.

In one case where the accompanying person was the son of a female patient, when asked who will be taking care of her at home, he said that his daughter is the caregiver of her grandmother “my daughter is sixteen years old, she successfully finished the 10th grade, and that was enough for her, she is free now to take care of her grandmother.”

All these cases reflect the inferior status of women in Palestine and how they are disempowered inside the household, while the social (marital status) emphasizes the role of women as caregivers. There is a hierarchy in the relationship between men and women, and unfortunately, women cannot break or do not try to do so, even after marriage (Marjorie DeVault, 1991).

The caregiver role itself forbids women from enhancing their capabilities and limit their educational opportunities. The caregiver role assigned to women (daughters and wives) is consecutive and permanent. Laila⁴⁴, who is taking care of her 79-year-old mother, said

I am not married. I do not work because I am taking care of her, she is my responsibility, and before that, I was taking care of my late father... I have got this experience with time. I was taking care of her and my dad before her for many years.

In another case, when the patient was a 95-year-old man, his caregiver was his daughter, who was aged 61. She fits in the age category of older adults herself, but her role as caregiver was

⁴⁴ All names are fictional for anonymity reasons.

always constant and never interrupted. She explained that taking care of her father was her role in life. Fatima, another caregiver of her 73 years old husband, when asked what she will be doing if not taking care of her husband, she said she would be doing domestic work. When I insisted on knowing if she will be doing anything special for herself she said: “No, before being married I was also taking care of my late father.”

Palestinian women believe that domestic and care work is their responsibility and role in life. These established gender dynamics and false beliefs are reinforced by the gender division of labour be it in the labour market or the household (James Heintz, 2006). These gender roles are reinforced in a patriarchal society as the Palestinian.

In one case there were two caregivers: a daughter and daughter in law, they affirmed that they also would be taking care of the old woman after being released from the hospital, or doing regular domestic work. When I asked if the patient’s sons also help taking care of her or to assist in the house, the daughter answered: “But what men can do for her? They come only to check on her; other things are not their duty”.

By paying money and not caring, men are believed to fulfill their role in the family as breadwinners, while women are the caregivers. In one case when the caregiver was a daughter in taking care of their mother, I asked her, what will be the role of her brothers, she said: “My brothers are responsible for all the expenses, the house, the food, they cover anything related to her expenses.”

In one case of a female patient, the caregiver was her daughter, although they told me that her son was a nurse. The daughter was the caregiver of the mother at the hospital, and the son’s wife was her caregiver at home, only because the daughter is married, as they explained to me.

This unequal division of unpaid care work between men and women mirrors women's inferior status to men in society, which is also attached to conducting unpaid care work (Nancy Fraser, 2007).

4.7.3 SENSE OF SHAME ASSOCIATED WITH CAREGIVER ROLE

Hilary Graham in 1983 discussed that caring seen as imperative of women. She pointed out how caring is identified as a female characteristic, while not caring became a male one (Graham, 1983, p.18). I argue that this discussion is still valid today.

Palestinian women, not only believe that caregiving is their responsibility, but also feel guilt and shame if they question this obligation. In one case, a daughter was the caregiver of her 68 years mother. She was asked how she feels about her role of caring; she said: "God commanded us to take care of our parents, I will feel guilty if I am not taking care of her. Also she feels better when she sees me. I understand her medical situation, and she trusts me." However, she did not think that her brothers were neglectful of this moral-religious obligation while not helping in the care process.

In one case, the caregiver was a widowed daughter of 68 years old. When I asked her who else was helping her in taking care of her mother, the patient 'the mother' answered me: "She is responsible for taking care of me." Sara, the caregiver, explained her mother's answer by saying: "Because my sisters in law, have to take care of the little ones, as you know." Another daughter who was the caregiver of her mother responded to my question on why she was chosen to be the caregiver, among her other sisters and brothers, as follows: "My sisters

are married, I am not married and do not have work.” The fact that she was not married or employed made her question her role in life if it is not taking care of her mother.

4.7.4 DEFINING THE CAREGIVER IDENTITY

Identifying the caregiver was not an easy task. Two or more family members surrounded most of the patients in the research sample. To know the real caregiver, I needed to ask questions related to caring of the patient *before* being admitted to the hospital, *during* their stay, and *after* leaving the hospital. In all cases, the caregiver before and after the hospital was a woman. In the cases where the accompanying person was a man, I had a deep conversation with each one on care activities, to unmask the real caregiver identity.

In Palestinian hospitals there are separate wards for men and women. This explains why there have been cases where men were accompanying their elderly relatives. In all cases, these men were sons of the patients and not even in one case; there has been a husband accompanying his wife. In the cases when the accompanying person was a man, female relatives will be spending the majority of the day taking care of the patient, while the male family member will sleep at the hospital with the patient. This pattern was not noticed in cases where the accompanying person was a woman. Women in these cases always were the caregivers for their elderly relatives day and night at the hospital. In two cases in the men’s wards, women who were the caregivers said that they were also sleeping with their relatives despite hospital regulation. One of these two women accompanying her sick husband said: “I never leave him, I sleep here at night... I do not care. I sleep on that chair”.

4.7.5 THE CAREGIVER'S NOMINATION PROCESS

Another issue that has emerged in this fieldwork is the nomination of a certain family member to be the caregiver. The collected data and fieldwork observations revealed the following pattern: **once a person accompanies the patient for the first doctor visit or to the hospital, she or he will be nominated to handle the care work subsequently.** This can be due to the following reasons, according to empirical evidence:

- 1- The person accompanying the patient to a doctor visit or to the hospital, in most cases is the one taking care of the patient/elderly at home. Thus, she or he has established a special relationship with the care recipient and had her/his reliability and trust. The caregiver in most of these cases happens to be a woman: wife or daughter, for example.
- 2- The person accompanying the patient to visit a doctor or to a hospital, in most cases, is unemployed or gives priority to care work against her/his a paid job, or education. Thus, other members are believed to continue their regular employment routines, while the caregiver is found to take long paid or unpaid leaves from work. Moreover, work leaves procedures for women conducting care work are easier to be approved than those for men. This results from the default social role assigned to women in Palestine as caregivers.

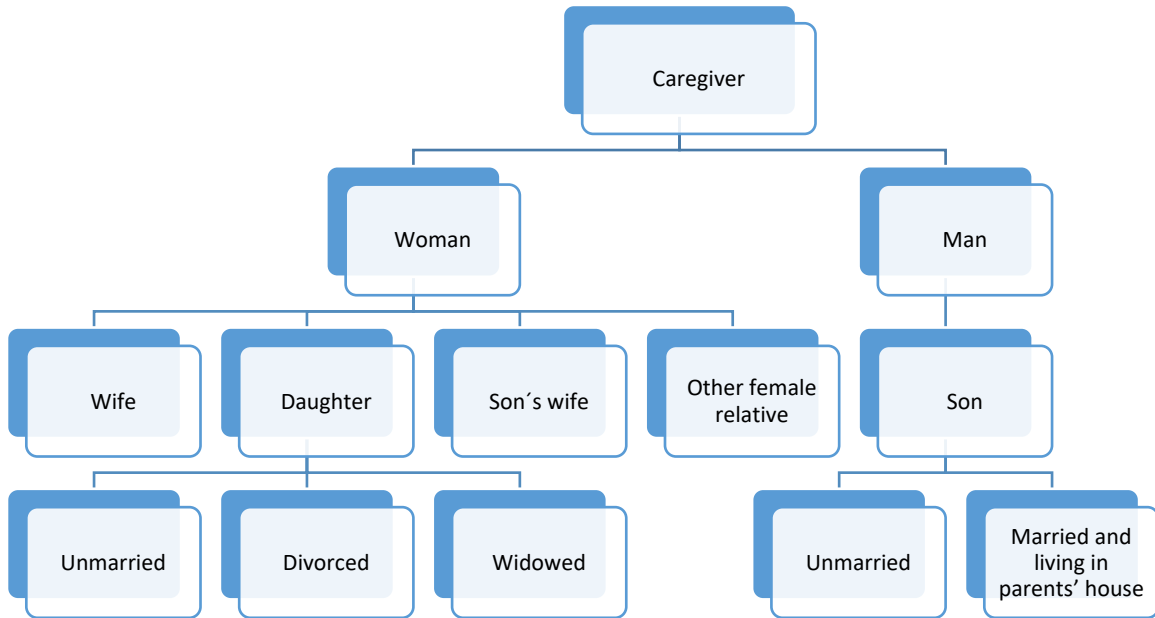
In analyzing the causation between caregiving and participation in paid work, the employment status of the caregiver was assumed as both: outcome and determinant. Interviewed caregivers in this study are nominated to the caregiving role because they

are unemployed. While other family members maintain their employment status, the caregivers have less time to search for paid work or to seek other employment opportunities. In some cases, long work leaves taken by caregivers, result in losing their jobs, or having fewer chances to improve their employment and financial statuses.

- 3- Women accompanying the patient to visit a doctor or to the hospital are family members (daughter, wife, daughter-in-law, aunt, sister, or another female relative). In most cases, daughters, the most common caregivers in my interviews, are unmarried, divorced, or widowed. We could argue social imperative to care work inside and outside the household for women in Palestine become an unarguable penalty. The caregiver role in the Palestinian society is not only constructed by gender identity, but also by the marital status of women, considering them a failure if not able to establish or maintain a heterosexual marriage.

Following figure number 1 shows the above-explained repetitive patterns between the gender of caregivers, their social status, and consanguinity with the patient, according to empirical evidence collected in fieldwork:

Figure 2 Caregiver Gender, family relation, and Caregiving nomination



In the light of figure number 2, we observe the following in regards to the caregiver nomination: in most cases, there was an economic dependency from the caregiver towards the patient or other family members who are not participating in the care work. The caregiver would be a person who is living at the patient's house and unemployed.

In the Palestinian community context, these things are explained as indicators to the social injustice surrounding caregivers, especially in the cases where the caregiver is a woman, where sometimes she get married to get rid of the social pressure on her, only to become the caregiver of an old and sick husband.

4.7.6 THE SOCIAL CONTEXT AND INTRA-HOUSE GENDER CONFLICT

Palestinian society is a conservative one. There was a tendency of interviewees to hide information about household care and conflicts in the family on the subject. I refer this to the strong family bonds and kinship inside the Palestinian community, alongside the prevalence of a 'shame culture' such conflicts and offenses committed within the family are always concealed. In one case the accompanying person was an 85-year-old woman taking care of her 90-year-old sick female friend, and some primary indicators on such conflicts inside the family were observed, when I asked her why she was accompanying her friend and not any of the patient's family, she said:

Her sons are living in Jordan, and I am the only person she has here, we live together, and I am not married, we have relatives here, but nobody cares, your sons and daughters will not care for you once you are old and sick, and I don't think distant relatives will care neither.

4.7.7 DEFINING CAREGIVING BURDEN

The fieldwork also revealed indicators of the caregiving burden, carried by caregivers accompanying elderly relatives and at hospitals. For example, while interviewing Kifah, who takes care of her 68-year-old mother, when asked about the things she does to take care of her mother at the hospital or at home, she said:

When she needs to use the bathroom, I go with her... Sometimes if she needs me to arrange her bed or to adjust it, I help her to eat and drink... if she is not in the hospital, I go to her place, wash her clothes, and prepare her food, things like that.

In the case of Mayson, who is taking care of her 79-year-old mother, she said regarding care activities at the hospital:

For three years now, she can't use the toilet, and she is using diapers. Even her personal hygiene, everything I do it for her own bed... Usually, she helps me, by moving slowly but now she can't, it has been a few days already that she can't move at all.

All of the study caregivers' answers confirmed that they practice the following care activities on a daily basis: hygiene, dressing, feeding, toileting, transfers, and mobility. In addition to other care work activities related to accompanying the patient and managing her or his issues. Providing basic medical care for elderly patients formed another pattern of care work activities in the fieldwork observations. During fieldwork, I was able to watch caregivers changing urine and serum bags, giving medicines to their sick relatives, running with patients to do blood tests or X-rays.

4.7.8 TIME SPENT IN CARE WORK (TIME ALLOCATION)

The question of "how many hours do you spend in the hospital, taking care of your elderly relative?" was asked directly and repeatedly to all interviewees. The answer in most cases was ambiguous; 13 of the respondents answered by "24 hours". I also asked about breaks they take, their answers were surprising, as nobody was taking breaks longer than 5 to 10 minutes, as to smoke a cigarette (only men gave me this answer), or to grab food (both men and women). Fieldwork observations revealed that the accompanying person stays all the time with her/his sick relative, providing supervisory care, or secondary (indirect) care activity (Nancy Folbre and Jayoung Yoon, 2005). That does not necessarily include giving a direct care work, but rather watching the patient and being present around him or her all the time (Jayoung Yoon, 2005).

Fieldwork findings reveal that public hospitals often refuse to admit an elderly patient without an accompanying person. This is not directly written into hospital regulations but is well known by practice, and confirms the role of invisible care work provided by accompanying relatives.

At one case when the elderly patient was a 95 years woman, who was not married and has no first degree relatives, her accompanying person was a distant relative who confirmed, that one time when she brought the old woman to the emergency department at the hospital, they refused to admit her, because she had no one to stay with her, she said: “I told them she does not have anyone, and that I am doing this in a voluntary way, and that I do not have money to take her to a private hospital.”

People in their part, fear to leave their elderly relatives, especially parents, alone at hospitals, because they do not fully trust the care provided by medical staff on the one hand, and because they are obligated to stay all time with the patient by hospitals directives on the other hand. In this regards, one interviewed caregiver said:

Once the old person is in bed and can't walk, they do not have anything to offer them. So old people feel marginalized as if they are deleted from this life. They review all of their life, the things that they did, all of their accomplishments, and now they have nothing.

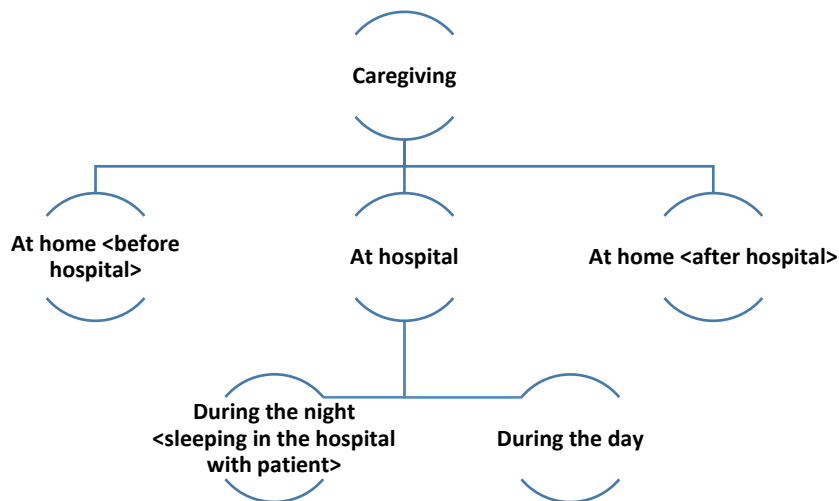
According to fieldwork observations, the number of hours that caregivers in this study usually spend in hospitals ranges between 8 to 10 hours. I could not detect the exact number of hours they spend in care work, but during my stay with them, I was able to count on my observations and the information they gave me in this matter to get the indicated average. Tracking the number of exact hours spent on caregiving and the different tasks for which the

care recipient needs support is not an easy task. As they include tasks during the day and night, inside and outside the hospital building, like pharmacies and blood banks, getting medical transfers, public health insurance paperwork, and so forth. This aspect still needs more assessment, and a large-scale fieldwork, that this study was not qualified to provide.

4.8 DISCUSSION OF RESEARCH FINDINGS

After analyzing the collected data, regarding unpaid caregiving work and caused burden, the findings revealed that caregiving is provided by study participants at the following cycles, as figure number 2 shows:

Figure 3. Caregiving cycles. As a result of analysis.



In the light of Figure 3., the caregiving burden is not only related to care work provided at hospitals, but it also could be influenced by the care work provided by caregivers at different levels, including care work performed before and after the patient is being hospitalized. To provide an accurate detection of the caregiving burden and its impact on the caregiver’s well-being, the previous analysis should include another level of care work performance that is at

the hospital, as shown in the figure. Data findings revealed different types of care work that can be provided during the day or at nighttime if the caregiver is sleeping in a hospital.

The fieldwork revealed the activities, and the approximate time each caregiver spent in the hospital accompanying the inpatient and taking care of her/him. This specific burden is called objective burden, which includes the following two categories of care activities on a daily basis: 1) *Activities of daily living*: hygiene, dressing, feeding, toileting, transfers, and mobility (Day and night). And 2) *Instrumental activities of daily living*: which include other care work activities related to accompanying the patient - including social interaction with the older adult- and managing her or his issues, be it medical, legal or financial (Day) (Greta Friedemann-Sánchez and Joan M. 2013).

Caregivers in this study are believed to have less time for paid work and employment, no leisure time, lack of social and self-education time, which produce negative impacts on their well-being, and different capabilities. This burden results from the adjustments in regular daily life activities that, for the sake of care work, the caregiver “chose” to neglect.

Performing *Activities of daily living* formed a pattern in the data collected from this fieldwork. In some cases, caregivers also provide intermediate medical care practices (nursing) while in hospitals, such as: changing urine bags, in bed bathing, bringing transfusion results of inpatient from the blood bank, checking sugar levels in patients with diabetes, reminding nurses of medicines’ times and doses. Most caregivers considered these nursing practices as part of their care work of the patient.

4.8.1 MEASURING THE EFFECT ON WELL-BEING AND THE QUALITY OF LIFE FROM THE CAPABILITIES PERSPECTIVE

The unpaid care work has no monetary value in itself as in paid work, thus measuring its value is not straightforward. Feminist economists, who were concerned about conceiving the value of unpaid care work, tried several techniques to overcome this obstacle, but the most famous one is The Time Use Surveys (TUS). TUSs track the unpaid work activities and calculate time spent on each activity, and then attach these numbers to their equal paid value in the market. This technique was implemented in many countries around the world, among them 20 developing countries (Nancy Folbre, 2006). However, this work is concerned about another aspect of unpaid care work, which is measuring its impact on caregivers' capabilities, hence their well-being status and quality of life, rather its quantitative value as in money paid to perform these activities. Taking account of how "the allocation of women's money and time affects their ability to develop their capabilities" (Nancy Folbre, 2006 p. 185).

From this work point of view, it is essential to tackle the non-monetary aspects of care work, mostly conducted by women, and how it affects their capabilities and quality of life. A qualitative approach, such the one presented in this thesis, undeterred by its small scale, can help reaching this end.

In studying and understanding human experience in the social sciences, employing quantitative approaches does not entail immediate facts such as those characterized by classic laboratory research. Instead there was a gradual movement in the kind of approaches used within the social sciences in order to qualitatively explore individual and social experiences that may result in a credible understanding of people's lives (Riessman, 1993). Such research

approaches can be traced back to the thirties and forties within qualitative work in the social sciences and sociology (Shaw, 1938; Whyte, 1943). Since then, the use of qualitative methods were widely detected in similar researches in social sciences that were interested in-depth understanding of human experiences within their natural settings (Bogdan and Taylor, 1975-1984; Strauss, 1987; Strauss and Corbin, 1990; Crossley, 2000).

In the application of capabilities approach in well-being gender budgets, we seek to answer questions related to human beings in their private and public spaces, in order to assess their quality of life and wellbeing status (Addabbo et al., 2008). That requires a shift in focus, from traditional measurement and evaluation methods of people's lives, which only recognizes the means of living such as their income and what they consume, to an evaluation that looks at what intrinsically matters, the real freedoms people have to live the kind of life they consider valuable. Those freedoms include the opportunities and capabilities of enjoying different states of beings and doings, such as being able to express their own opinions, having access to resources, and enjoying a healthy life (Robeyns, 2003).

Thus we are seeking new approaches for assessing and accessing unquantifiable facts about people's lives, which I am, as a researcher, is interested in observing and understanding. Moreover, "qualitative techniques allow researchers to share in the understandings and perceptions of others and to explore how people structure and give meaning to their daily lives. Researchers using qualitative techniques examine how people learn about and make sense of themselves and others" (Berg, 1989, p.7).

TUSs, lack a particular activity code that captures the supervisory care activities (Jayoung Yoon, 2005). That said, the qualitative procedures applied in this research, are able to provide

such means; thus, a small scale, qualitative research as the one presented in this thesis, is more capable of giving us a more accurate perception of the nature of unpaid care work and its burden on the shoulders of caregivers.

In this thesis, I constantly argue against the plausibility of one unified and universal set of capabilities. I claim that in order to create a valid list of capabilities for a certain population/context, we should pay attention to their daily activities, cultural backgrounds, in addition to their social interactions in everyday life, considering all the complexity that might be added to that, if a citizen is from a certain age, gender or any other identity that he or she might hold.

As such, capabilities in this thesis are used as proxies for well-being and quality of life, while primary data from empirical fieldwork research are used to give indicators to conversion factors that affect the achievement of these capabilities. During the fieldwork, participants' answers helped to anticipate the social and cultural conversion factors, affecting their different capabilities. These factors are marital status, leaves from work, gender, and employment status. These conversion factors will be our index, to highlight the unpaid care work implications on caregivers' well-being and the development of their capabilities.

In the following table, I will try to introduce a gender-based analysis of raised indicators, to sort out relevant conversion factors for the five selected capabilities:

Table 5. Conversion factors, indicators, and capabilities (ORIGINAL EMPHASIS)

Capability/ Conversion Factor	Living a healthy life	Access to resources	Autonomy over time	Caring for others	Caring for oneself
Marital status (being married, unmarried, divorced, widowed)	-	High positive impact for men High negative impact for women	High negative impact for women Low negative impact for men	High positive impact for women Low positive impact for men	High positive impact for men High negative impact for women
Taking Leave from work	-	Low negative impact for women Indifferent impact for men	Low positive impact for women Indifferent impact for men	High positive impact for women Low negative impact for men	Low positive impact for women High positive impact for men
Gender	Low positive impact for men High negative impact for women	High positive impact for men Low positive impact for women	High positive impact for men High negative impact for women	High Positive impact for women High negative impact for men	High positive impact for men High negative impact for women
Employment status (being employed or unemployed)	Low impact for both (positive if employed and negative if unemployed)	High impact for both (positive if employed and negative if unemployed)	Low impact for both (negative on women and positive on men)	High positive impact on women Low positive on men	Low positive impact on men Low negative on women
Quality of service at hospitals	Same impact on both (proportional high negative)	Same impact on both (proportional high negative)	Same impact on both (proportional high negative)	Same impact on both (proportional low negative)	Same impact on both (proportional high negative)

As is shown in the table above, each conversion factor has an impact on one or more capability. This effect is divided into four categories according to its intensity and positive or negative impact on men and women, as follows: high positive, low positive, high negative, or low negative impact. In some cases, the conversion factor indicates a similar impact on men

and women, but in most of the cases, this effect is different and distinct.

In what follows, I will try to show evident the relation of one conversion factor, which is the employment status of women and men (being employed or unemployed), and its direct influence on their capability of access to resources. From a gender perspective, there is a clear deprivation in this functioning (capability) in Palestine, with an unemployment rate among women of 44.7 percent against 22.5 percent for men in the year 2016 (PBCS, 2017) as it was commented in-depth in the previous chapter.

The development or deprivation of this particular functioning (capability) is interrelated with the development/deprivation of other capabilities, with a gender perspective. Such as the capability of taking care of others or taking care of oneself, autonomy over time and living a healthy life. As such, the care work provided by women, be it unpaid domestic work or invisible care work, deprive women of the opportunity to achieve these capabilities, hence negatively impact their well-being status.

All factors mentioned above, are considered *external* conversion factors that if correctly intervened and enhanced will produce a positive effect on the development of the women's capabilities under discussion. For example, Palestinian policymakers can contribute to the conversion of citizens' capability to work into actual employment, by the use of active programs instead of passive ones to empower women and change the policy language and orientation into gender-based ones. Palestinian work law still requires the issuance of implementable regulations that includes clear and direct addressing to domestic work and vocational training, where most women actually exercise their occupational lives, as well as gender-based measures and regulations in regards to the minimum wage, work leaves, and vacations.

Another recommendation that can help the capability of taking care of others and one-self is to adopt new enhanced parental leave and childcare policies. That allows both parents, and not only the mother, to take their role in improving the child's well-being. All these questions were also suggested in the previous chapter while addressing the capability of access to resources.

4.9 CONCLUSIONS

While caregivers form the link between the care recipients and their full functioning in society, they are rarely considered when human development policies and mechanisms are set. These policies are created at a macro level only, despite the fact that they create certain patterns in individuals' behavior, which in turn produces cumulative effects on the development of the society. Thus, caregivers will be more vulnerable regarding well-being outcomes than non-caregivers that will result in making them need care, themselves. This situation produces discrimination and inequality in the society and inside the household, especially against women, who form the majority of the caregivers' population.

This chapter suggests that in order to understand this cyclical pattern of needs for caregiving inside the society, as well as health and economic outcomes of care work, a profound interdisciplinary research is needed, before deciding on any well-being, health and development policies. This is sought to help uncover the objective and subjective burden that caregivers have to bear, on the macro, meso, and micro levels.

On the other hand, studies that are conducted and policies that are adopted to encourage women's participation in the labour force, do not take into account the effects of this

involvement on the informal systems of care that women provide. Thus, the effects of care work conditions that women provide, on their health and well-being, remain invisible (Diane Elson, 1991). Any approach aiming to increase the participation of women in the formal economy needs to recognize their contribution to the wellbeing of the society as a whole and, to provide the basis for the co-responsibility on those tasks beyond gender imperatives: caring is a collective imperative linked to collective survival.

This chapter aimed to demonstrate the connection between unpaid caregiving and the development of human capabilities, to assist policymakers in perceiving the impacts of their policies and public services have on caregiving paybacks.

This study through a gender-based analysis was able to identify the caregiver identity in the Palestinian community and what kind of activities are included in the caregiving process, as well as nature and form caregiving burden, and finally, the commitment of caregivers to caregiving and its effects on their well-being status. However, the study was not able to analyze the process of intra-family resource allocation, neither to capture the intra-household conflict on the distribution of caregiving responsibility, and deeper qualitative research is still needed to cover these aspects.

CHAPTER FIVE: CONCLUSIONS

Palestinians as a nation and the concept of Palestine as a State, have challenged and complicated many of the premises and presumptions, as those made on the makeup of the Palestinian nation and if the Palestinians are indigenous to the land of Palestine, as well those that imply questioning the impact of the Israeli military occupation on the territories, and the ability of the Palestinian to self-govern, while on the other hand questioning the possibility of creating a Palestinian state at all. A status made all the more significant by the adverse conditions under which the Palestinian National Authority has been achieved, due to the ongoing colonial predicament of the Israeli occupation and lack of an internationally recognized Palestinian state structure. However, the Palestinian interim of self-government has evolved thus far in an *ad hoc* fashion.

In this critical process of Palestinian state-building, as I have pointed out in previous chapters, the implemented development policies and measures of economic growth, are built and adopted upon revising macro-level data such as GDP, labour force participation rate. But as human development measures are limited by the aforementioned data, this creates certain patterns in behavior of individuals and the whole society at large that may have cumulative effects on their well-being and quality of life.

This doctoral thesis argued that policies and related programs that overlook these effects, and fail to acknowledge them through the budgetary cycle, without examining their implications on Meso-level (society) and micro-level (individuals), are considered incapable of bringing

about true human development and building a well-being state. Furthermore, such missing data will prevent policy planners from arriving at potent solutions for intractable economic problems such as unemployment, poverty, and invisible care work. Similarly, these programs stand ineffective in handling underlying social problems such as gender inequality. Moreover, the scrutiny of care work at meso and micro levels can provide us with important and more relevant indicators of human development and well-being, as well as connections to related capabilities.

This thesis set out to explore the concept of well-being in Palestine by reviewing the public budget and policy with a gender perspective. The study has identified the nature and current form of public budget and related policies in this country; the influencing factors and determinants of the well-being of the Palestinian people and the quality of their lives; the extent and resources required for well-being enhancement and sustainability; and the role and impact of governmental actions and public policy on macro, meso and micro economy on well-being of people.

Accordingly, this thesis developed a conceptual and heuristic framework that created reflections and understandings of the well-being of people in this occupied country. This structure examined the possibilities of applying the gender budgeting framework combined with the capability approach, with a particular focus on gender equality; hence, the application of the Well Being Gender Budget to the Palestinian context.

The thesis explored the WBGB methodology, concluding it can result in an effective well-being development, particularly in Palestine.

The general theoretical literature on gender budgeting and the capability approach, specifically, in the context of an occupied country, is inconclusive on several vital questions within the well-being in continuous conflict regions discourse, as in Palestine. Therefore, the thesis sought to answer these two main questions:

- What are the real needs and concerns of the Palestinian people?
- How does one identify the different capabilities of a Palestinian citizen?

Accordingly, while building the analytical framework, the following interpretive questions were asked by this study:

- How has the Palestinian public policy design and implementation contributed to shaping patterns of gender inequality in society and decreasing quality of life and well-being of different social groups, and reducing the capabilities of women in particular?
- How does one identify potential alternatives and actions to highlight what is considered important and yet feasible for the Palestinian people? Thus, how does one translate this new knowledge into useful policy suggestions and recommendations?

In this final chapter, I will review the research contributions of this thesis, by indicating main empirical findings that answer the above-mentioned research questions. I also will identify the theoretical and policy implications of the study. Respectively, the limitations of this study will be highlighted. Finally, I will discuss directions for further future research and final study recommendations.

5.1 EMPIRICAL FINDINGS

This section will synthesize the empirical findings to answer the study's research questions.

First, a hierarchical framework that categorizes various ways in which the capability approach and WBGB methodological tools can improve the assessment of Palestinian people's quality of life and well-being was introduced in this thesis. This framework suggests that in the assessment process of well-being for Palestinian people, we should look at their actual beings and doings, thus achieved functionings, in order to understand their aspired states of beings and doings and opportunities to them; hence, their capabilities. As such the evaluative space proposed by this framework is: people's functionings.

This framework suggests as well that this evaluation process should be done on three levels, through the assessment of relevant determinants:

First, on the state level: public policymaking process, equal opportunities to capabilities, provision of social security and social services, employment rates, indicators of education and health services.

Second, on the community level: public action and political participation, social norms and discriminatory practices, gender-related assessments of well-being and disadvantage.

Third on Citizen/ individual level: opportunity to access services, taking account of her different conversion factors, as gender, physical abilities, age, sexuality, geographical location, socio-economic status, distribution of resources inside the household, caring responsibilities.

Specifically, two fieldworks were conducted to help this assessment. In addition, this framework provides a heuristic view of methodological aspects of well-being assessment in Palestine; it also provides a natural guide towards future research (as it will be discussed in Section 5.5).

Second, the thesis allowed a comprehensive discussion on selected capabilities for the Palestinian people, to forward the application of WBGB and the capability approach framework to the assessment process of well-being in Palestine, within the policy space.

Third, this thesis provided a survey on the current methodologies applied in the measurement of well-being in the capability approach, which sought relevant to the Palestinian case.

5.2 THEORETICAL IMPLICATIONS

On the one hand, the first stage of this research showed that it was possible to aggregate a participatory initial selected list for the capabilities of the Palestinian people. True to the form of an exploratory study, the first stage utilized a small sample to gain insight into the nature of the conceptions of interest. The results, however, were preliminary and cannot be generalized easily. Although an initial participatory selected list of capabilities meet with all of the relevant criteria for viability (Nussbaum, 2000; Robeyns, 2003; Addabbo et al., 2008; De Villota et al., 2007), some parts of the results were incoherent to be considered as a complete and definite list that is representative of the Palestinian population capabilities, but rather a vector of functionings, limited to its production conditions.

However, this study has shown that it is possible to take this initial participatory method and refine it with an expanded sample in future research, to reach a list of capabilities for Palestine. One of the major implications of this study is that the initial participatory selected capabilities can serve as a productive framework from which to study and measure the well-being of Palestinian people through the capability approach.

On the other hand, this thesis, moved the research towards a more convergent form, by utilizing the characteristics of a convergent approach to refine elements and results of the initial participatory methods developed through the fieldwork.

This was done through the second stage of fieldwork that included qualitative interviews for a smaller but more focused sample of the Palestinian population. Not only the several aspects of this second stage served to increase the reliability of observation findings that described

the capabilities and needs of Palestinian people, which yielded means for generalizing over samples in the same population but also provided further strengthening of refined participatory approach as a viable model for the assessment of well-being in Palestine.

5.3 POLICY IMPLICATION

A particular public budget and policy assessment effort with extended gender perspective was the MIFTAH initiative that promoted social dialogue and influence on public policies In Palestine, by which the Palestinian government agreed to merge gender in the public budget (MIFTAH activities report, 2011). However, evidence from a 2014 MIFTAH Policy meeting report and from current thesis, point to the fact that the Palestinian budget remains conventional and biased towards development issues in general and towards gender in particular. As it maintains policies and procedures that help producing and reproducing gender inequality. This study has used empirical findings to show that the current gender budgeting efforts in Palestine are not making the needed impact, in enhancing people's well-being and quality of life, especially women and the unprivileged inside the Palestinian community. The theoretical arguments for this justification suggest the need for serious national budgeting and policy review, which will enable the advancement of people's capabilities and well-being, at macro, meso and micro economy levels.

5.4 POLICY RECOMMENDATIONS

This thesis suggested to Palestinian policymakers, to shift their attention to match with what people will be able to do with the services offered to them, such as training programs, social benefits, and so on, in order to enhance their capabilities, and how they will use these services to create valuable opportunities. Thus, the suggested informational bases would not depend on the current beings and doings of people (functionings), or what they have done in the past, but rather on what they will be able to do and be in the future, hence their capabilities and not deprivations, while taking account of their own needs, wishes and preferences (Bonvin & Farvaque, 2005).

In what follows, I will try to introduce foreseen policy recommendations, to enhance the capabilities of Palestinian citizens studied in this thesis:

First: Enhancement of Gender Inclusion

- 1- Start by contributing in the conversion of citizens' capacity to work into actual employment, by the use of active programs along with passive ones that guarantees the equal opportunity to all citizens in accessing the labour market, to empower women and change the policies language and orientation into a gender-based ones.
- 2- To overcome the freedom of mobility obstacles, by establishing new working units and subunits, in different cities, according to their inhabitants' needs and demand, with an account of gender, age, and physical abilities, as well as daily routes to work or job search.

These actions are predicted to have a significant impact on the rates of women participation in the labour market, as they are usually the most affected by the mobility obstacles while seeking employment opportunities.

Second: Securing equal distribution

1- To consider teleworking vacancies and to promote them in remote areas and geographically disconnected territories.

For Palestinian women, the freedom of movement is a major issue as it has been frequently mentioned in the fieldwork findings. Hence their capability to access resources, work and services is highly affected by this obstacle. Women face difficulties in moving from their places of residence to seek the Ministry's services. Men, on the other hand, have an advantage in this movement process and access to decision-making circles. These facts give men preference over women in reaching the final aim of being employed or finding a job. Establishing new working units and subunits in different cities, as well as creating teleworking positions, would help women to overcome this obstacle, especially those women who live in remote and disconnected areas that rarely benefit from adequate services or infrastructure enhancement projects.

2- To adopt new enhanced 'parental leave' and 'childcare' policy that allow both parents and not only the mother, to take their role of raising their children and improving their well-being.

Within the Palestinian labour Law, Palestinian working women are entitled ten weeks of paid maternity leave, from which at least six weeks should be right after delivery, and it prohibits employers from any arbitrary dismissal of women employees during this period (Article 103). As for childcare and nursing, it permits women of breastfeeding breaks during working hours, and for a total of less than one hour per day, during the first year after delivery (Article 104).

However, there is no legal provision that gives the husband/father any paternity leave, despite the importance of his co-involvement in the care of the newborn. These above mentioned legal measurements are considered inadequate and gender-biased, as such, an urgent action towards their modification and advancement is needed.

The objectives of labour policies should recognize the gender balance not only in the workplace but also inside the households, were working fathers and mothers, but mostly mothers provide unpaid care work since women are the majority of leave takers (Gwennaële Bruning and Janneke Plantenga, 1999). In most European countries, these objectives have been achieved through adopting policies that include ‘daddy quota’ and paternity leave. In Spain, for example, The Spanish Equality Law of 2007 declares explicitly the need for increasing work-family balance to avoid discrimination against women and ensure the equilibrium of family responsibilities (Law 3/2007, of March 22nd). Thus, paternity leave seems to be an important element to reach a gender balance in this regard. This paternity leave can be the motive to change the view of women as the only caregiver, especially inside the household and in childcare responsibilities. Recently, the Spanish Congress approved equality on parental leave, for both fathers and mothers. This means that both parents can enjoy six-teen weeks of full paid leave to take care of the new family member, be it by birth or adaption.⁴⁵ And thus it will support women return to the labour market, instead of encouraging women to extend their maternal leave by taking unpaid leaves, to take care of their babies or to accompany her husband. This is relevant and equally important, because the

⁴⁵ Royal Decree-Law 6/2019, of 1 March, on urgent measures to guarantee equal treatment and opportunities for women and men in employment and occupation. Published in BOE no. 57 of March 07, 2019

core of a person's well-being and her/his social awareness, starts at the nuclear level that is the household.

It is very important to read above-mentioned policy recommendation within the Palestinian context studied in this research. I have pointed out how the Israeli occupation depended upon racism and reproduced patriarchy inside Palestinian society. Thus my suggested recommendations are not claiming to present an absolute solution to all discussed issues within the policymaking process, but rather they are undertaking a gradual path towards the needed change, that more likely to succeed.

5.5 LIMITATION OF THE STUDY

The study has proposed an innovative framework for the measurement of Palestinian people's well-being through an analytical and evaluative perspective on national public budget and related development policy programs. The study's fieldwork was conducted in the Palestinian context through sampling the Palestinian population from different cities and backgrounds. As a direct consequence of this methodology, the study encountered a number of limitations, which need to be considered:

1. The sample settings as well as data collection techniques, in the first and second stages of fieldwork, were affected by the limited resourcing that was available for this study.
2. The lack of relevant literature on the research core subject made the data collected in the two research stages, the main information source to learn about people's well-being in Palestine and their quality of life, in terms of their capabilities. Hence, this study in view of these mentioned conditions is not ready to formulate any

generalizations about the Palestinian population in this aspect, and the findings of this study are limited to these conditions only.

3. Palestine suffers from weakness in the organizational and institutional structure of government budgets. There is still little interest in the subject of budgets at the higher management level in ministries and budgets are still handled by the financial administrations and not by their policy-makers. Thus, there are expenditures that were difficult to analyze on a gender or capabilities basis, including some operational expenditures.
4. The current form of the Palestinian Public budget an article-based budget in spite of efforts to turn it into a program and performance-based budget or a gender-responsive one. Additionally, the examined Palestinian ministries have no specific program budgeting mechanism. Even though these ministries tried to integrate such a mechanism within their strategy for the years 2014-2016, on the ground, this integration was never implemented. As a result, this study was able to predict the influence on people's well-being from a gender perspective, and not from the real impact from the implementation of their programs.
5. Because of the obstacles mentioned above, the study only analyzed the expenditures chapters and not the revenues from a gender and capabilities perspective. Moreover, such analysis for revenues is difficult at present, because Palestine is linked to the united customs envelope with Israel according to the Paris Protocol⁴⁶

⁴⁶ The Protocol on Economic Relations, also known as the Paris Protocol, was signed in 1994 between the Palestine Liberation Organization and the Government of Israel. It remains the general framework that governs Palestinian trade relations and economic, business and tax policies.

5.6 RECOMMENDATIONS AND FUTURE RESEARCH

The scale of the debate raised in this study is extensive and multifaceted even at the local level. To generate achievable policy strategies and development targets with regards to people's capabilities and well-being, there is a need for more case studies at the local level to allow further assessment of local dimensions of the subject. Exploring the following as future research strategies can facilitate the attainment of this goal:

- More quantitative and qualitative studies that provide data and statistics on a gender basis whether in regards to the overall and sector-oriented economy and specifically at the micro-level and household economy and social conditions or to the programs and projects in the budgets are needed. In addition, further investment in new data analysis techniques is necessary to provide a comprehensive set of indicators in terms of well-being dimensions and gender equality.

- This study was only able to reflect on a few dimensions of Palestinian People's well-being. I advocate for future research on other dimensions of well-being within the capability approach. Such research should be conducted alongside an institutional partnership to include training for the technical expertise of those in charge of preparing, analyzing and assessing budgets, whether in the government, from monitoring parties or civil society institutions. These training programs should include activities on the new methodology and its application. Such training is needed because of the radical change of focus and the predicted complexity in implementation of such a multidimensional approach to assessing the quality of lives.

- Accordingly, there is an essential need for social participation in terms of the people's representatives in preparing the budget and monitoring its implementation. It is necessary to allow public reasoning on the well-being dimensions and their impact on the quality of life in general, and on gender equality in particular. This participatory approach has been tried through this thesis, and research results show that it could be effectively applied to forward developing and experimenting new innovative tools and methodologies in the participatory process.

In spite of the plausibility of the capability approach for assessment of people's well-being and quality of life, in practice the efforts to make it operational and applicable in theoretical and policy debates, are limited. Nevertheless, the benefits of this approach have been used to develop an innovative framework for the measurement of well-being with a gender perspective. However, this methodology has limited applications and is exclusively applied in two European countries: Italy, Spain, and recently in Turkey.

This methodology was found to be plausible for application in the Palestinian context to improve sustainable well-being in this country for the long-term. Thus a new customized framework was developed in this thesis, promoting the need for the protection and enhancement of Palestinian citizens' rights in the form of capabilities, as the first step in this direction. This thesis argued that the enhancements of these capabilities is a basic requirement for any policy that is aimed at human development, and it should be perceived as such by policy-makers.

However, the application of this framework is not explicit or direct, and it was only advocated as an abstract proposal for the enhancement of well-being and development practices in Palestine.

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The UN Practitioners' Portal on HRBA

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URL: <http://www.inmujer.gob.es/>

Palestinian Ministry of Education

URL: <http://www.mohe.pna.ps/>

Ministry of Culture in Palestine website

URL: <http://www.moc.pna.ps/>

The Palestine Economic Policy Research Institute (MAS)

URL: <http://www.mas.ps/index.php>

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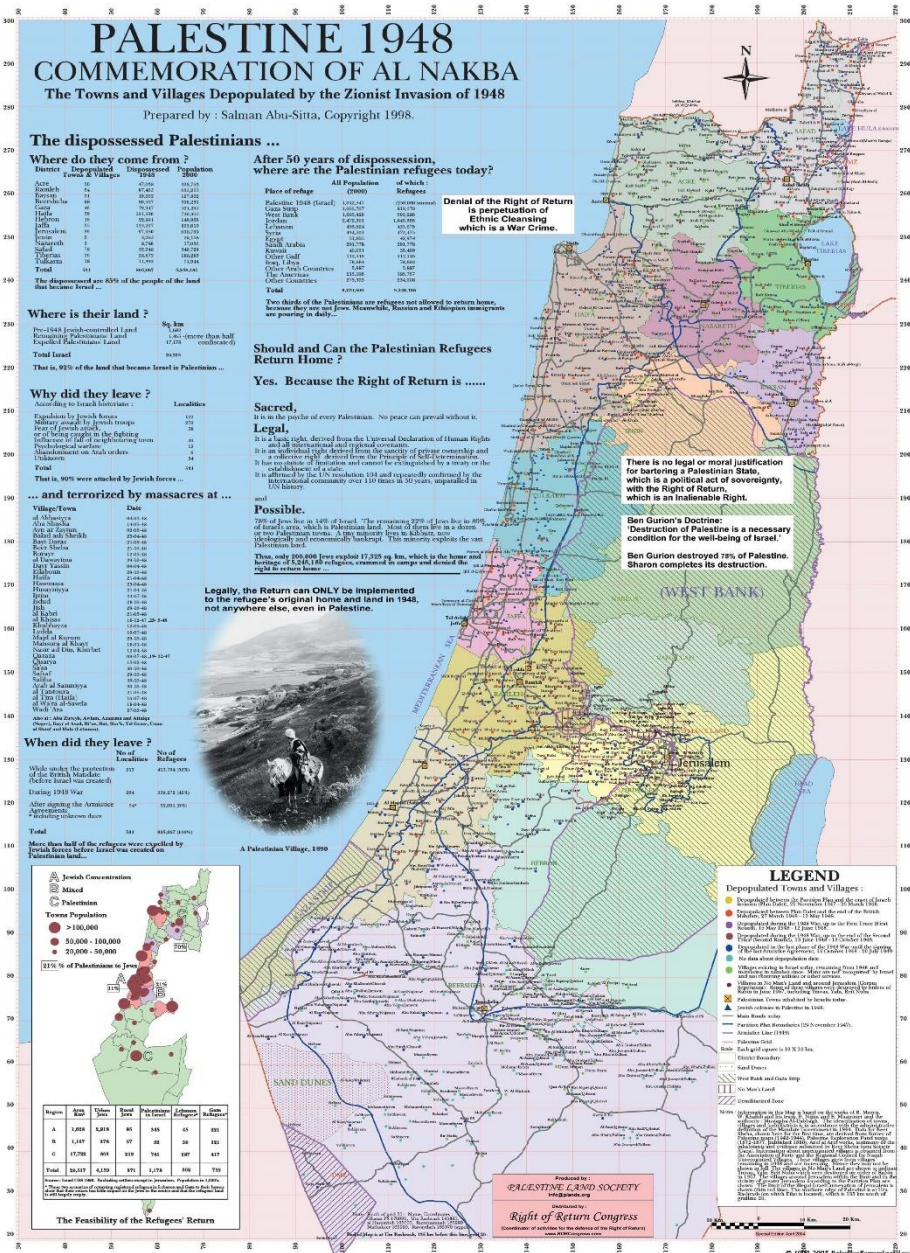
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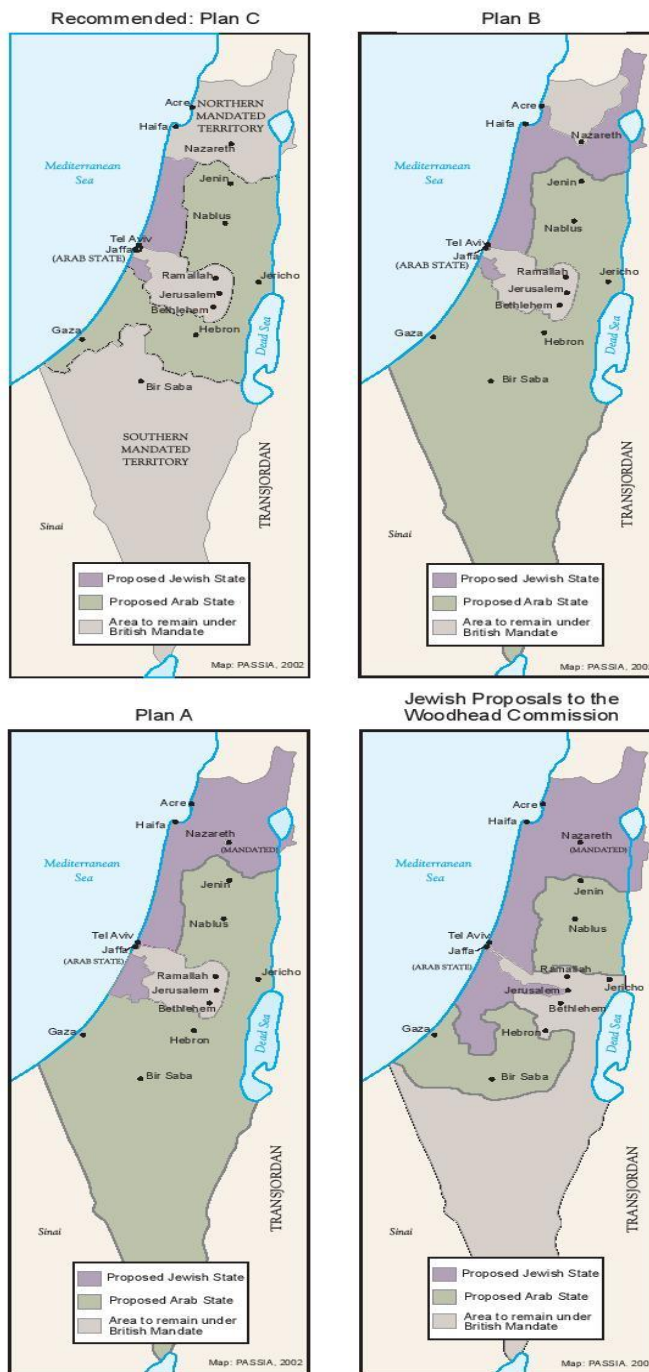
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APPENDICES

APPENDIX 1 HISTORICAL MAP OF PALESTINE – NAKBA 1948



APPENDIX 2 UN PARTITION MAP OF PALESTINE



APPENDIX 3 FIRST FIELDWORK QUESTIONNAIRES

Well Being and Gender Budgets in Palestine

1. Do you have a driving license ?
هل لديك رخصة قيادة ؟

yes
 no

2. Do you have a car?
هل تملك سيارة خاصة بك؟

yes
 no

3. what is your sex?
ما هو جنسك؟

Female
 Male

4. Do you use public transportations?
if yes, what type of transportation do you usually use?
هل تستخدم المواصلات العامة للتنقل؟ إن كانت الإجابة "نعم" الرجاء ذكر نوع وسيلة النقل المستعملة

5. What is the average rate of the public transportation that you use?
ما هو متوسط الأجرة التي تدفعها عادة في المواصلات العامة؟

6. How do you consider the conditions of roads connections and quality ?
كيف تصف الحالة العامة للطرق والشوارع في منطقتك؟

7. Do you cross any checkpoints in your daily route?
هل تضطر لعبور أي حواجز إسرائيلية خلال الطريق التي تستخدمها يوميا للتنقل عادة؟

Yes
 No

8. Do you need a permission to go out ?
هل تحتاج إلى تصريح أو إذن للخروج من البيت؟

Yes
 No

Well Being and Gender Budgets in Palestine

9. In case of a need of a permission; do you need it from:

إن كنت بحاجة لإذن أو تصريح للتنقل أو الخروج من البيت : من المسؤول عن منحك إياه

your guardian (father; mother; brother; husband or wife ...etc)

from israeli authorities

from both

10. In case that you are not employed yet; do you need to travel through the same route to search for work?

في حالة أنك لا تعمل الآن, هل تضطر لاستخدام نفس الطريق السابقة للبحث عن عمل؟

always

sometimes

never

Enjoying Art, Music & Public Spaces in Palestine

1. What is your sex?

ما هو جنسك؟

Female

Male

2. How many often do you attend or participate in musical concerts, art exhibitions ..etc?

هل تذهب او تشارك عادة في أية حفلات موسيقية أو معارض فنية .. إلخ؟

3. How do you consider the average rate of musical, art or cultural events as :

كيف تصف معدل أسعار التذاكر لحضور حفل موسيقي او نشاط فني أو ثقافي مثلا ؟

Expensive

Cheap

Average

Free

4. Do you know what is the concept of recycling or what are the benefits of using organic products?

هل تعرف ماذا يعني المصطلح **إعادة التدوير** للنفايات مثلا ؟ هل لديك فكرة عن فوائد استخدام المنتجات العضوية؟

5. How do you spend your free time?

كيف تقضي وقت فراغك؟

6. Do you use any organic products? do you recycle your trash?

why? (please answer in case of yes or no)

هل تستعمل أي منتجات عضوية؟ هل تقوم بإعادة تدوير نفاياتك؟

الرجاء الإجابة مع ذكر السبب سواء كثات الإجابة بنعم أو لا

APPENDIX 4 SECOND FIELDWORK: FACILITATION LETTER

State of Palestine
Ministry of Health - Nablus
General Directorate of Education in Health



دولة فلسطين
وزارة الصحة - نابلس
الإدارة العامة للتعليم الصحي

Ref:
Date:

الرقم: ٢٠١٥ / ٦٠٣ / ١٦٤
التاريخ: ٢٠١٥ / ٤ / ١٤ ح

الأخ مدير عام الإدارة العامة للمستشفيات المحترم،،
الأخ مدير مجمع فلسطين الطبي المحترم،،

تحية واحترام،،،

الموضوع: تسهيل مهمة إجراء دراسة بحثية

تماشياً مع سياسة وزارة الصحة المتعلقة بتعزيز التعاون مع الجامعات والمؤسسات الأكاديمية بإتاحة فرص التدريب أمام الطلبة والخريجين والباحثين في المؤسسات الوطنية وإسهاماً في تنمية قدراتهم. يرجى تسهيل مهمة الباحثة ميساء حجاج - طالبة دكتوراه في جامعة كوميليووتنس مدريد-إسبانيا في عمل دراسة حول امكانية الحصول على ميزانية رفاة للنوع الاجتماعي في فلسطين، وفي هذه المرحلة سيتم اخذ عينة تتعلق بكار السن بعمر 60 عام فأكثر، وبالتالي يرجى السماح لها بعمل مقابلات مع مرضى عينة الدراسة بعد اخذ موافقتهم (خمس حالات في كل مستشفى)، في مستشفيات بيت جالا وأريحا والمجمع الطبي، وستم عمل مقابلة مسجلة معهم، علما بأنه سيتم الالتزام بمعايير البحث العلمي والحفاظ على سرية المعلومات.



مع الاحترام،،،

د. أمل ابو عوض
ق. أ. مدير عام التعليم الصحي

P.O .Box: 14
Tel.:09-2333901

ص.ب. 14
تلفون 09-2333901

APPENDIX 5 SECOND FIELDWORK: CONSENT FORM

CONSENT FORM

Thank you for participating in the Well-being gender budget under the capabilities approach Phd research, and specifically the fieldwork related to detecting invisible work provided by caregivers, accompanying elderly patients in public hospitals in Palestine. By signing the form below, you give your permission to include any recorded tapes and/or photographs made during the fieldwork for exclusive use for this above-mentioned research, where the data will be used by the researcher for educational purposes only, including publications, thesis presentations, post doctoral educational conferences. By giving your permission, you do not give up any copyright or performance rights that you may hold, or any other use of personal data collected during the fieldwork. I agree to the uses of these materials described above, except for any restrictions, noted below.

Date: _____

Researcher's signature: _____

Caregiver's Signature:

Restriction description: _____ Please do not use my name in association with these materials: _____

APPENDIX 6 SECOND FIELDWORK: INTERVIEW QUESTIONS' THEMES

An unstructured interview is a spontaneous conversation, not a specific set of questions asked in a predetermined order. However, my focus in this fieldwork was to ask participants questions that are related to these specific themes:

The demographic aspects, their age, and city/village/ material and employment status, in order to know why they seek social public insurance services.

The patient's first visit to the hospital or to see a doctor. In order to know the reasons behind the caregiver nomination.

Care of the patient before/during/ after the hospital (who is taking care of the patient at home) before being hospitalized.

The time they spend in care work.

The care work activities; (how they care of the patient), (what times, during the day or at night?)

The things that doctors and nurses ask them to do while at the hospital, what things they do in a voluntary way.

The basis at which they have been chosen to be the accompanying person at the hospital (if they have any other relatives that can do this work and why they are not doing it instead of them?)

How they take care of themselves, how their lives would be different if they are not accompanying their sick relative.

2015-2019