

Well-Being Gender Budgets: Italian Local Governments Cases

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CAPPaper n. 41

marzo 2008

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JEL Classification: H72, I31, J16

KEYWORDS: HUMAN DEVELOPMENT, ECONOMICS OF GENDER, GENDER AUDITING, CAPABILITY APPROACH

Introduction

This paper implements the methodological tools developed at regional and local governments level on gender budgets, using Sen and Nussbaum capability approach to design Well-Being Gender Budgets (WBGB). Following the methods first discussed in Addabbo, Lanzi and Picchio “*On Sustainable Human Development: Gender Auditing in a Capability Approach*” (2004), the framework used in this paper is an *extended reproductive well-being macro approach* that includes unpaid work, focuses on gender inequalities in well-being, and uses an analytical perspective which places the process of social reproduction of the population among the structural processes of the economic system and as a fundamental condition of its sustainability (Picchio, 2003).

The paper is divided into four sections. After the Introduction, in the first section the perspective and method of WBGB are presented. In the second, the recent experiences of WBGB adopted in Italy at provincial district and regional level are introduced and the Italian local governments institutional context is presented. In the third, a list of capabilities, based on the administrative structure of the local governments adopting the gender budget, is proposed. In fact, the structure of the different Departments (Health, Education, Transports, etc.) is seen as the result of an historical assumption of public responsibility towards specific dimensions of residents’ well-being, such as: being healthy, educated, mobile in the territory, carer of others, etc.. The context analysis is then designed to provide empirical information on a set of effective functionings that are used to assess gender inequalities in a specific well-being domain.

In the fourth section, new tools (capabilities matrices) are introduced, drawn to help public policy actors to become aware of the implications of their choices on the multidimensional well-being of the women and men living in their territory. Moreover, some examples of budgeting monetary resources, taking into account well-being policy objectives are illustrated, with particular reference to the Piedmont Region and the Rome Provincial District.

The WBGB approach that we here present has been applied at various levels of local governments and in particular in the cases of: Emilia-Romagna Region, 2003, which included the gender budgets of the Modena Provincial District and Modena City Council (Various Authors, 2003), Emilia-Romagna Region, 2004 (SCS, 2005), Modena Provincial District, 2004 (Dal Fiume, 2006), Bologna Provincial District, 2007 (Addabbo et al., 2007), Piedmont Region, 2007 (Badalassi, 2007), Lazio Region, 2008 (Addabbo, Corrado, Galaverni, La Rocca, Misiti, Picchio, Squillante, 2007). At present the

approach is used for specific capabilities by the Modena City Council and by the Bologna Provincial District.

The results of these Italian local-government experiments in WBGB are here proposed to share a different way of approaching the assessment of the gender impact of public policies and to open a discussion on their pros and cons. We think that their tools could become a key to policy integration and a basis for social participation in a public reasoning process on well-being, but they need to be discussed in a wider forum, and the possibility of their application to other countries and at different government levels also needs to be discussed.

1. Well-being as approach to gender budgets

When public budgets are viewed from a gender perspective it becomes clear that ignoring the differences between women and men, and their unequal living conditions, is a cause of inequity and poor results in public policies. Gender budgets based on the well-being approach define the multidimensional nature of these inequalities, and disclose a methodological confusion between ends and means, arising from ignoring, in the macro economic policy framework, the complexity of the individual and social processes by which public resources are converted into actual well-being of women and men.

To accommodate this shift of perspective on the budgets framework, we must clarify certain concepts and analytical tools: for example the term well-being, belongs to the common language, but there its meaning is not very precise. Sen uses a particular definition of well-being which avoids reducing it to a mere package of goods and services, defined as “standard of living” (Sen, 1987). Following a classical humanist tradition, he returns it to the level of a normative experience of a “good life”, characterized by a combination of capabilities whereby women and men, individually and in relation to others, can carry out daily practices which effectively qualify their lives, on the basis of their values (Sen, 1993). In this view the criteria of value refer both to a moral context, in a given time and place, and to an exercise of autonomy and individual liberty. Thus the criteria of value are neither constant over time nor exclusively local, because the cultural, moral, political and religious frameworks in which people think about their own lives are being ineluctably globalized with the current high degree of nomadism and cultural fluidity. Henceforth we shall use the term well-being to refer to this multidimensional, fluid and malleable domain whereby women and men act in public and in private.

This opening of perspective is particularly important for a gender analysis of public policies, because it is precisely in this multidimensional domain that inequalities between women and men become most marked. In this perspective, local governments have the duty to recognize the inhabitants of their area as subjects, with all their differences, and to treat the context as a social space in which individual potentialities can be supported and realised, fixing rules and norms and providing the infrastructures and services necessary to provide equal opportunities to a good life.

The worst fault of the dominant economic perspective comes from thinking of women as a social category rather than as a fundamental subject in human society which, like the male subject, is divided into categories by social condition, trade, etc. Still more serious, from the symbolic and practical point of view, is the fact that women are seen as a service infrastructure whose role is to maintain productive and social capital and sustain a social system based on severe inequalities and consequent tension.

The different processes whereby resources are converted into well-being, individual and collective, should be kept in mind when formulating and implementing public policies; it should not be assumed that providing equal means will suffice to obtain equal results in terms of the quality of life of different persons (Sen, 1993).¹ Equality of opportunities in a well-being domain, is thus not guaranteed by the criterion of equal resources for all men and women. Disparities are caused not only by unequal distribution, but also by the fact that well-being, in its multidimensionality, is so complex and variegated that it cannot be assumed that all persons access and use resources in the same way. As it happens in the case of care work, to obtain an effective result in terms of well-being for flesh-and-blood people one must use many different instruments, calibrated to suit the quality of caring taking into account individual differences. While policies should not get submerged in endless differences of detail, it must always be borne in mind that real people have bodies, that they are in necessary and responsible relationships with other people, and that they have different individual and social characteristics. This is important because such differences can markedly affect the use of goods, commodities and services, and, above all, the results of policies. The following diagram is an attempt to represent the complexity of the process that converts goods and services into the well-being of those who live in a given area.²

¹ A dynamic relation exists between individual well-being and collective well-being for belonging to different groups is important for specific dimensions of life and for their importance in the qualification of the social context. On this question see Stewart (2005).

² The diagram elaborates on a first one proposed by Robeyns (2003).

Fig. 1: CONVERSION PROCESS OF MEANS INTO A WELL-BEING STATE

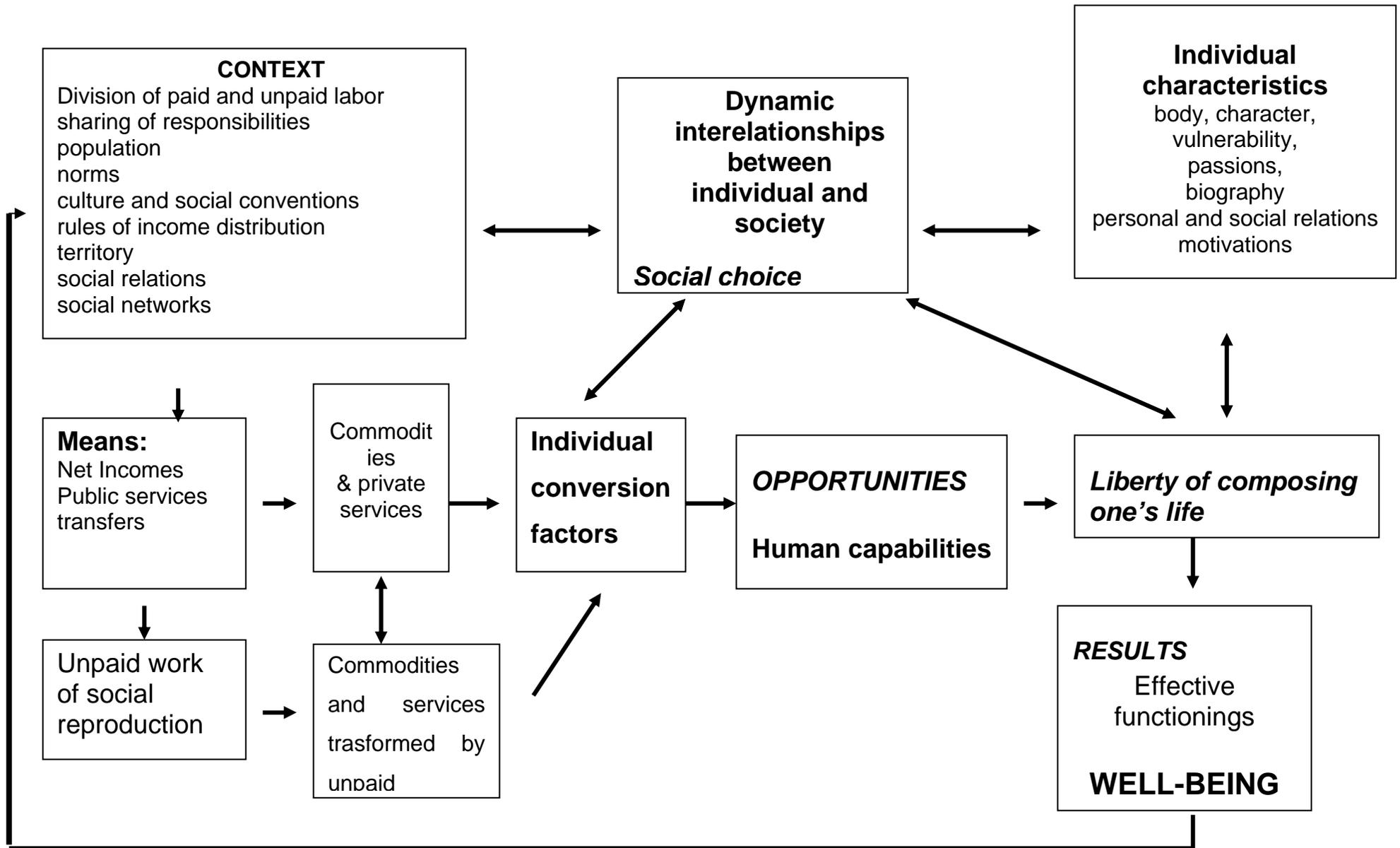


Figure 1. offers a view of the complexity of the process of conversion of goods, commodities and services into effective well-being, understood as a set of valuable functionings. Visualising the process of conversion brings out the role of unpaid domestic and care work in transforming goods to provide a better standard of living (cooking food, washing clothes, etc.), and the role of caring in forming and maintaining individual capabilities, for example being healthy, educated, responsible, sociable, etc. (Picchio, 2003). The picture also shows freedom as an essential component of the quality of life. Precisely because the process of living is so complex and people have such strong aspirations for a good, worth living, life that the attainment of well-being ultimately remains an individual practice of creative composition of different dimensions. The context, however, defines the space of opportunity and equity which makes possible to pose the question “equality of what?”. Hence it becomes a public responsibility to remove the obstacles that impede a satisfactory use of people’s capabilities, and to sustain the quality of their lives. More over, individuals can impact back on the context especially if the individual and collective well-being experience is discussed in a public space.

Obviously there is the problem of who decides, and how they decide, which dimensions of value to include in the definition of well-being, what thresholds indicate a state of deprivation in these dimensions, and which subjects require attention. Sen would say that these choices must be argued in a public forum, and in fact that is what has happened historically in various ways. This has led to the present form of the local governments, whose administrative and political structure has a history of long deliberations about its public roles and a long process of negotiation between the State and civil society, reflected in the forms of political representation and their evolution over time. That means that well-being is linked with democracy based on a free and responsible relation between individual and society. Gender budgets in a well-being approach (WBGB), if used as instruments of transparency and accountability on the basis of women’s agency in the public forum, could thus lead to an effective advance in democracy and become a viable tool for social participation.

The dynamic key to the system that enables and qualifies the process of conversion of commodities into actual well-being, lies in the interactive interdependence between individual and society that leads to innovative social transformations, which are sometimes sedimented in new institutions, norms, conventions and modes of production. In these transformations individual liberty and agency to defend the quality of each person’s life, and that of the collective, constitutes the most precious human

capability, the one which, on the basis of an innate motivation to search for a good life, activates social relationships and productive processes, and creates social sustainability over time.³

Because of their historical role women form a subject which eludes reductions and simplifications: in various ways, usually marginalised, they pose the complexity of life as a personal, social and political problem. Women, for example, always make visible the strict relation linking labour for the market with unpaid domestic labour and care responsibilities, and hence paid labour and the network of personal relationships that make life sustainable. Moreover, they always make explicit the need for an order of priority between productive and reproductive responsibilities. This is not a rigid natural order, but one continually adjusted by women in the course of the day and the life cycle, on the basis of their needs and their aspirations to a good quality of their own lives and those of the people they care for. It is worth noting that precisely because of this salutary wisdom and mental flexibility, women are penalized and marginalized in a male model of the labour market where real lives are seen as an impediment to competition and a cost which enterprises do not recognize as essential to the productivity of labour, and thus externalize in fixing wages, work loads, times and security. The practices women use to balance paid work and family responsibilities serve to reveal certain fundamental aspects of the economic structure. They can bring out critical vulnerabilities in the social system which are quite evident in real life, but hard to analyse in an economic perspective that conceals structural aspects linked to the process of social reproduction related to the distribution of income, responsibilities, access to resources, expectations, perceptions, and last but not least the quality of civil and domestic life. These are the fields in which gender inequalities are statistically visible and allow for comparative territorial analysis.

Strict attention to the activity and mutual relations of men and women in the private, sphere illuminates the process that daily enables them to act in the public sphere, to access resources and to act politically. The relation between private (domestic) spaces and public ones is an interdependent, dynamic and circular one, fundamental for the sustainability of the economic and social system. It is also at the centre of the question of gender relations, given that the final responsibility for the process of adapting the

³ This dynamic key was seen by both Smith and Marx, in different ways, as the basis of the structural dynamics of economic and institutional systems. It can characterize the epochal phases of the relation between production and social reproduction, in which subsistence crises and strong aspirations for a "good life" leave their mark on modes of production.

quality of life to the modes of production and distribution of resources (private and public) is allocated to women; and this means the quality of life of adult men as well as of children and old people. Women's role or ultimate responsibility for the quality of life is becoming less and less sustainable with the present dramatic shift of resources from wages to profits and financial rent, which has grave effects on real wages and security of work and puts at risk deferred wage components (pensions) and social wages (services and public transfers) because the same regressive redistributive process leads to cuts in social public expenditure.

Recognizing the existence of two sexed subjects with different experiences of life follows a principle of realism that marks our analytical perspective, extending it to dimensions that are usually hidden or set aside. If one takes account of women's experience in the daily process that enables people to live, work and act in society throughout their lives, the analysis becomes much more complex but also more concrete and relevant to people's lives and to the sustainability of the economic and social system. This broadening of the perspective also raises the possibility of greater effectiveness of the policies which otherwise pay the price of a lack of lucidity on a dramatic reality that constantly takes policy-makers by surprise.

WBGBs allow a level of mainstreaming that offers new possibilities, not only for rereading all policies in terms of gender, but also re-visualising the general framework that determines their order of importance and monetary dimensions, disclosing analytical connections that mark the budgetary framework.⁴ Moreover, they allow a reassessment of the process of formulation of budget documents, and hence also of political and administrative processes. In this regard gender budgets are part of a growing tendency towards greater transparency at various institutional and social levels, and a greater accountability for policy results.⁵

Women have a particular interest in making visible the division of responsibilities for their own well-being and that of others, and bringing it into public discussion, because normally they are tacitly assumed to be ultimately responsible for the sustainability and quality of living conditions.

Gender budgets, if not restricted to the sphere of monetary resources, offer an occasion to look at the overall political perspective, and help to reveal certain systematic

⁴ For connections between budgets and analytical frameworks see Galimberti (1970).

⁵ On recent developments of performance budgets proposed also by OECD and for a critical assessment of the possibility of effectively engender them, see Klatzer (2008).

distortions and obfuscations in the very architecture of the framework on which accountability is based. This is a perspective which, on the basis of economic theory, defines the nature of consumption, investment and capital, and determines which questions lie at the centre of the productive system or at the margin of it as social questions. With a systematic confusion between means and ends, in the traditional theoretical picture the exclusive field of observation is the market that is to say, only paid work and the exchange of goods and services, not responsibilities, unpaid domestic or care work, or the real lives of people. In this reductive economic picture even motivations for public action hardly fit in, because it is an analytical system methodologically hostile to the state, especially when the state is concerned with protecting the quality of life, and the life itself, of those who depend on wages. Lastly, the overall picture is totally blind to the enormous mass of unpaid work which women do in the process of social reproduction of the population, which is no longer included by economic theory among the great processes that structure the economic system - as if workers did not exist in flesh and blood, did not have relationships and care responsibilities, and their ability to do things did not need to be formed and continually sustained (Elson, 2004; Elson e Cagatay, 2000; Picchio, 1992, 2003; Gita Sen, 2000).

The novelty of WBGB does not lie in choosing well-being as the basis of policies, for in theory that is already the public aim *par excellence*. What is new is the use of a framework of economic analysis that recognizes new connections and brings out the results of policies for the level of well-being, in other words revising the usual hierarchy between economic and social data.

What must be confronted is the picture of normal functioning of the system, beginning with the social reproduction of the strong and protected sections of workers. Hidden fundamental aspects, hitherto heaped on the backs of women and shut away in domestic negotiations and depressions, must be revealed. To this picture we add the further problems involved in the reproduction of weak sections of the population that are not self-sufficient.

To summarize the proposed gender-budget approach from a well-being perspective we can indicate its methodological characteristics as follows:

- It assumes that human subjects who live and act in society are male and female, and hence physically and historically two subjects in relation to each other. Both these subjects are also marked by many social inequalities, of class and category, and by differences of age, ethnic origin, religion, etc.
- It conceptualises well-being as a complex of dimensions, defined capabilities (potentialities) for action and existence, and a sub-complex of functions determined by the free and effective exercise of individual capabilities by real persons, located in a social, moral, territorial and historical context.
- It evaluates public policies from two points of view: 1) inequalities of gender, 2) well-being as a complex of equal opportunities.
- It uses women's experience of life to define the effective multidimensionality of well-being.
- It takes account of the processes that give access to resources and enable people to compose the dimensions of their own lives according to their criteria of value.
- The list of capabilities refers specifically to the politico-administrative structure, taking account of the functions and objectives contained in the budget documents of the local governments concerned;
- The list is proposed by those who draft the WGBG and discussed with representatives of the administration; however it could also be discussed and agreed in wider circles with the participation of civil society, thus gaining in clarity and political significance;
- It attempts an accounting of the expenses involved in the policy objectives, based on the levels of dimensions of well-being for those who live in the area, which are identified in the list of capabilities considered representative of the functions of the local government body.

Having presented the approach in this section, and clarified why it is important to use gender budgets shifting the focus directly on women and men well-being, in the following sections we shall analyse the ways and the tools for doing this.

2. Italian Local-governments and Well-being Gender Budgets (WBGB).

2.1. The novelties in gender budgeting.

The implementation of WBGB in Italy is part of the practice of gender budgets that has spread at local government level since 2000. While some analytical techniques are shared by all gender budgets (classification of expenditures with direct or indirect impact on women, search for indicators sensitive to gender differences), WBGB differs from other experiments with gender auditing because of its focus on well-being, which affects both the classification of monetary resources and the indicators used to measure the gender impact of policies. As we saw in the foregoing section, this approach uses a double key for reviewing policies, whereby gender inequalities are linked with several dimensions of well-being, and these become the basic ground for investigating gender inequalities. Context analysis is thus extended to cover a multiplicity of dimensions of life that connect demographic, economic, social, cultural and relational aspects. The descriptive analysis aims to give the fullest possible picture of the conditions and functioning of women and men in relation to a list of capabilities identified as important for the local governments undertaking the gender budget. Naturally, there are the usual problems in obtaining data disaggregated by gender, and these must be dealt with case by case on the basis of survey data covering the area and any available local research. Moreover, information must include economic data, for example on employment and income, and data on paid and unpaid care work, health, teaching, mobility, social networks, etc. To take in the multiple dimensions of well-being the analysis must also include the access to resources available to different people living in the area, and must take account of the different periods in the life cycle to cover processes cumulative over time –for example the care, health and education of children or the income from women’s work and their careers, which ultimately affect their pensions while the total work loads affect their health in old age. Finally we must remember that statistical studies are generally concerned with actual functioning and not with potentialities or possible choices that define a capabilities setc.

Budgets with a well-being approach (WBGB) constitute an original proposal that shifts the perspective on assessment of policies from the usual analysis of means directly to that of the quality of life of those who live in the area⁶. While proposing a particularly

⁶ In the course of this work we generally refer to the inhabitants of the area, though sometimes we also use the terms citizens or residents. The most correct term is 'inhabitant' because these are the people for whom public policies are made, even if they do not have citizenship or residence permits: they still have basic human rights such as the right to dignity and integrity of the person - rights protected by law.

innovative perspective, which is not currently adopted in the use and practice of local governments, it has been received with interest by some administrations. This is because it reveals problems in the definition of the objectives of public policies, and in the relation between local government and the local population, which are recognized as real and urgent. Moreover, generally these administrations are particularly open to questions of gender and to social participation, and already possess some interpretative and cultural tools for making their importance visible, even in the absence of consolidated techniques. This is certainly the case with the provinces of Emilia Romagna, Piedmont and Lazio, which were already committed to budget transparency, accountability and to initiatives of social participation. In less advanced regions of Italy, it would probably be more difficult to challenge the perspective and practices of the budgetary process. But it must be said that while the new language of well-being - taken as a set of capabilities and functionings of men and women, in flesh and blood - may be found rather complex, it is not really more so than the traditional utilitarian economic approach that tends to hide in formal sophistication a reductive framework that excludes the major dimensions of real life and its relational and ethical quality.⁷ The difference is that people do not usually question the meaning of mainstream theories while they say to have difficulties in understanding the terms *capabilities* and *functionings* that refer to their human experience. As a matter of fact, Sen's approach is closely linked with the experience we all have of the complexity of living and of human relations as elements affecting the quality of life and our choice of means. Certainly some new problems of measurement are created by the multidimensionality and by the kind of data that do not lend themselves to rigid definite quantification, such as being healthy as one is not simply healthy or unhealthy or healthy to a certain numerical degree. However, it is always advisable to treat reality and information for what they are and not for what we would like them to be, trying to force them within analytical constraints.

2.2 The Italian institutional context.

In Italy the first experiments with gender budgets were carried out in 2001 at local and provincial levels. These were followed in 2003 by the Emilia Romagna's regional feasibility study. The experiment of gender budgets has spread, especially in the North and Centre, and is beginning to move also at national level. In 2007 some law proposals were presented for a gender auditing of the national budget and in 2008 a group of experts was formed to study its modalities.

⁷ On this see Sen (1987).

In this respect Italy differs from other countries where gender budgets have mostly begun at national level and local decentralization perhaps has favoured greater attention to the processes and the quality of real life of the population.⁸ Nonetheless, because gender budgets in Italy began at the level of Local Governments one must take account of the institutional differences between geo-political areas and government levels (Regions, Provinces and Municipalities) because their institutional powers, objectives, preparation of budget documents partly change in relation to the territorial, institutional and political context.

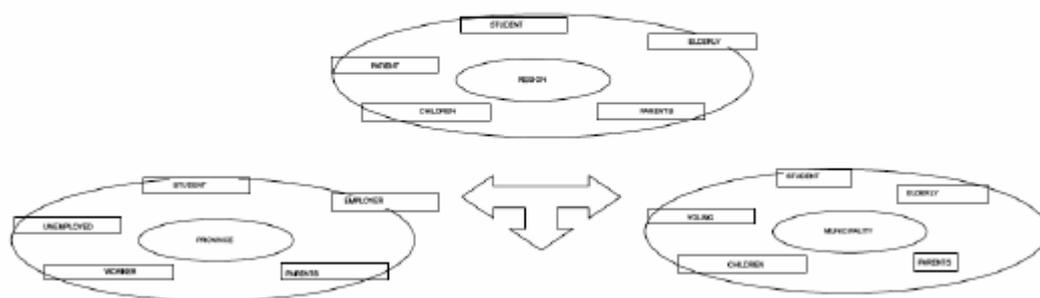
In fact, while competences and responsibilities based on the Constitution and the legislative system are shared among the different institutions, there are many differences, not only at the level of economic and social development, but also in levels of transparency of public action, political representation and participation of civil society. Considerable differences can also be seen in the degree of empowerment of women, though it is worth noting that in the whole of Italy women are markedly under-represented at all levels of government. In fact across Italy there are different levels of gender inequalities and awareness of the complexity of the gender problems.

Even within the same local government level, the observable context differences impose different conditions which affect policies and the administration as they reflect different local historical negotiations between public institutions and civil society, including female and feminist organizations. The functions of the local governments are organized administratively in departments (*assessorati*) that refer to a political representative and are directed by functionaries of the administration. The *assessorati* can differ in name, number and powers, according to different local administrations, and can present specific organizational features that reflect local political motivations. In the WBGB, functions, powers and political aims are jointly used to draw a list of significant dimensions for expressing the administration's responsibilities for the quality of life of the population. This list, as we have said, can be discussed within the administration or with the participation of civil society. Local governments are situated in an institutional network that position them according to functions, fixed by law or by a system of delegations of functions. The institutional network is not always clear, nevertheless the list of capabilities may include common responsibilities, for example health and mobility, that can assume different meaning and content according to government levels. For

⁸ However, the experiment of context analysis carried out in the Lazio Region and included in the Lazio Report on the economic and social conditions of the Region, prepared as the basis of the 2008 provisional budget, offers tools of economic and demographic analysis, which could be useful also at national level for auditing the financial law in a gender perspective (Addabbo, Corrado, Galaverni, La Rocca, Misiti, Picchio, Squillante, 2007).

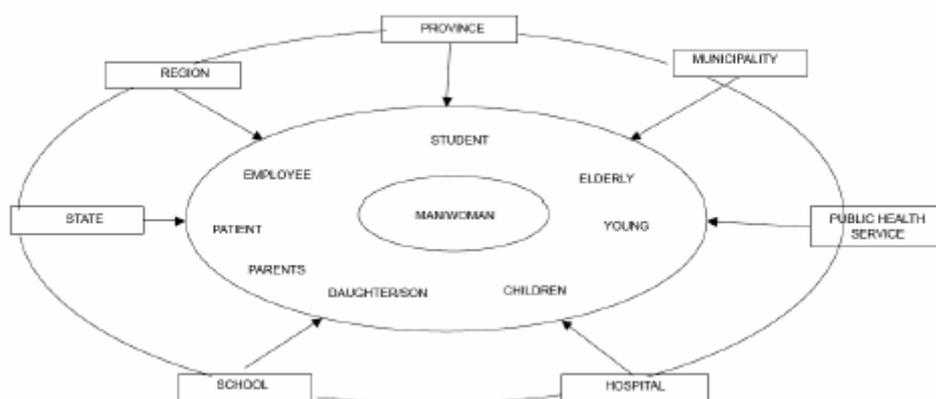
example, the Provinces deal with extraurban transport while the towns and cities have the duty to furnish urban transport. Thus the two administrations provide different means to enable people to move around the area. Budget analysis in a well-being approach, taking account of people's experience, can help to bring out redundancies and inconsistencies in the institutional network that impact on the quality of people's mobility. In the territorial fragmentation of government bodies the users of services are seen by policy makers as segmented in separate categories: students, patients, dependent old people, children, parents, commuters. The government agencies are different, but the people are the same, and are often in close relations with each other. Figure 2 shows how there is a typology of stakeholders that separately access services of different agencies - as youths, old people, students, workers, patients, parents, etc.

Figure 2 Public administrations and beneficiaries in the present context



As each structure operates only in the sphere of its own specific competences, one loses the overall sense of public action and joint responsibility towards those who live, work, care and move in the area – action and responsibility which in the end ought to lead to a composite and if possible harmonious result. In reality illuminating the multidimensionality of living opens a prospect for policy integration and cooperation among different levels of local government.

In the capability approach the population is seen first of all as flesh-and-blood women and men whose well-being is given by complex sets of potentialities and effective functionings and having responsible relations, motivations and being political active.

Figure 3 Public institutions and beneficiaries in WBGB

For example each individual may at the same time be a worker, a patient, a student, father, mother, etc., while the different public bodies, for obvious organizational reasons, deal separately with health, school, children's services, and seem to forget that they are dealing with the same people who must live in a fluid way in daily time and in the life cycle, working, moving about the area, looking after others and themselves.

The gaps in social responsibilities in institutions are much more visible if we observe the specific way they affect the well-being of women, who, as we pointed out in the first section, historically play the role of connecting dimensions, spaces, responsibilities as their care work is used to overcome the fragmentation of time and spaces, to sustain the quality of their lives and of those they care for. Hence there is a functional relationship between public action and women's care responsibilities, a relationship that is neither discussed nor negotiated at the public level, but instead is considered a natural component of femininity meant as an infinite resource (Elson, 2004). To correct these distortions of perspective, as we said before, it is not enough to trace their effects on women's and men's living conditions but also a change of the present underlying perspective is required.

An example already observed in different countries regards the reduction of time spent in hospital by patients, which saddles families, and thus mainly women, with the work of caring for convalescents. In our view only an integration of regional policies (concerned with health) and municipal policies (concerned with home assistance) can reliably avoid a gap in provision which would otherwise become invisible in passing from the public dimension of service (the hospital) to the private (the home). The capability approach makes it possible to reveal the costs in terms of human development on the part of care-givers and care-receivers, and the gender approach makes it clear who are the

actors involved in the process of care and who are the subjects most exposed to a deprivation.

In the present form of linkage between institutions the widest disparities of gender are manifested where there is a reduction of responsibility towards the citizen in his or her integrity. Although in Italy there have been some legislative interventions (for example see Law 328/2000 that provides the legal framework for an integrated system of interventions and social services) and projects integrated among agencies to at least partly fill this gap, services for the 'social sections' are still distributed unevenly and depend either on the initiative of single agencies, or, often, even of single administrators within each agency.

Finally, we must note that the Italian system provides for local administrations a budget structure significantly dependent on delegated transfers, especially of regional or state origin, which are limited to specific purposes, while autonomous resources, which would guarantee more room for choice, are meagre in some cases, for example in the provinces and often budgets offer little flexibility in the distribution of resources to the various services.⁹ To this limitation on the use of the transfers must be added other elements of rigidity in expenditure, for example payments for personnel, which in fact limit the possibility of a different allocation of resources.

Thus in the experiments conducted it has often emerged that more than the financial data it is often useful to observe the modalities of allocation services, to see what the administration can do, including relations of subordination with the other institutions: local governments, public agencies (in health, transport, utilities), and third non-profit sector, which operate in the same territory.¹⁰

⁹ In Italy at present on this point there is a hot political debate under the name of 'fiscal federalism', whose results will have a major effect on the future system of local governments.

¹⁰ An example in this sense regards the service of labour exchanges to match supply and demand run by the Province of Genoa. With a rather reduced financial commitment, the service, at first directed only to enterprises and workers, was implemented with a specific department for managing the supply and demand of labour for families that need personal or domestic care workers. The Province, responsible for labour policies, also formed a connection with the Genoa city administration which was responsible for family policy. They shared the list of qualified baby-sitters which the city was already making available to the citizens. From this case it is clear how a different way of providing a service, even jointly with other local government bodies, given the same amount of resources spent, can have a considerable gender impact.

3. WBGB tools: a list of residents' capabilities drawn from the administrative structure.

The implementation of gender auditing according to the well-being approach requires the choice of a set of capabilities considered important for the local context analysed. To construct the list of capabilities several methodologies have been proposed, which can lead to different results. One can start from a 'universal' list like that of Nussbaum (2003) or follow the approach described in Robeyns (2003), defining and justifying capabilities in relation to the context, or, as suggested in Addabbo, Lanzi and Picchio (2004) defining a list on the basis of the functions of the public administration being audited, taking account of the aims stated in the statute and other program documents (such as the Mandate Budget) which fix its objectives. The process of defining the list of capabilities can be more or less participatory, open to different strata of civil society and/or to the representatives of the administration. The process to draw the list can be mixed, inside and outside the administration. It can help to spread awareness in society of the role of gender auditing, and to stimulate public reflection about what a 'good life' could mean for people firstly of different sex, and then of different class, ethnic and geographical origin, etc.

The list forms a good basis for fixing indicators of empirically observable functionings, for gathering information in time and for evaluating the impact of policies over time on the various dimensions of well-being for different subjects and groups. Actually, until now there has been little continuity, though the Bologna Provincial District and the Modena City Council are continuing on specific capabilities, in particular: in Bologna the 'ability to enjoy beauty' and 'of access to knowledge' and in Modena the ability to 'be and feel safe' and the capability 'of taking care of others'.

In the different experiences of WBGB the working group GenderCAPP, to which the authors belong, has tried different ways of formulating the list that did consider the links among different levels of government, and has proposed a list to apply to the functions and politico-administrative structures of each administration and to its programmatic and budgetary documentation. As an example, to give a clearer idea of the list of capabilities, we present below the capabilities identified as important for the analysis of budgets and public policies in the province of Rome, with an explanation of their significance.

1. **Access to knowledge** (education, training and information): that is to say the accessibility of training and education throughout life. The province has responsibility for education and training, including that of adults, and, through the powers assigned to it by law and by its delegation for labour by the Region, also for measures designed to favour access to the labour market (including training policies). In the courses financed, knowledge may be more or less closely linked with the acquisition of specific work skills. Under the heading of this capability are included services of information, communication, etc.

2. **The capability to live a healthy life**, or to guarantee and improve one's own health. All the functions linked with the environment, road safety, and some limited socio-sanitary services, directly affect the development of this capability, which is also indirectly influenced by all the policies dealing with sport and with control of diet. In the latter area, however, the direct role of the Province is limited because these policies belong mainly to the Region.

3. **The capability to work and carry on business**. This covers paid work and self-employment. The province has departments dealing with work and employment centres, and can directly influence the development of this capability, which, as the gender perspective reveals, is strictly interrelated with the development of other capabilities usually neglected in economic analysis: these are quantifiable in unpaid domestic and care labour performed mainly by women. The provincial council can intervene in the development of the capability to work and do business by direct exercise of its powers over active and passive labour policies, by supporting women's enterprises, by acting indirectly in the spheres of education and training, and by forging links with other agencies in the area which are more directly responsible for care services.

4. **Access to public resources (services and transfers)**. Access to public resources by using services or receiving transfers is central to this capability, in whose development the provincial government participates directly through services and transfers provided for the families or individuals. Hence we speak of defining criteria of access to public resources and/or of the provision of public goods and services.

5. To live and work in adequate and secure places and in an eco-compatible environment. This capability regards the adequacy and security of all the private and public spaces in which human life goes on, whether in relation to working, personal and family life, to the acquisition of knowledge, or to travel between different places. Thus this capability can be affected by provincial functions involving planning and urban development, public buildings, buildings safety regulations, defence of the environment, roads and transport.

6. To travel. This refers to the individual's ability to move about within the province. The provincial administration can have an impact on the development of this capability through the exercise of the functions regarding transport, roads and territorial planning. The same capability interacts with other important capabilities like the ability to work, to be educated and trained, to care for oneself and others, by allowing and facilitating movements in daily life, with due care for their security and adequacy. In the interlinking of different capabilities one can see the different behaviours of women and men with regard to their movements and their motivations.

7. Caring for others. This capability includes the care work done both for one's relatives residing in the nuclear family or outside it, and for others as unpaid voluntary work. If the local government has direct responsibility for children's services and care work in the community, the province can influence the development of this capability both through sub-provincial agencies and through functions linked with the labour market, for example by improving the work-life balance and adopting practices that facilitate care for workers' relatives who need it. The administration can help to develop this capability by designing policies which facilitate the distribution of unpaid family work, and by giving support to care work. Similarly, supporting the voluntary sector and working with associations existing in the territory influence the development of caring.

8. Caring for oneself: time, culture, sport and recreation. This capability includes both the possibility to have time for oneself, and the ability to use the time in recreational, cultural and sporting activities. In its dealing with sport, free time, tourism and culture, the administration can have a direct impact on the formation of this capability. Indirectly it can influence the possibility of having time to use in these activities through territorial planning with the construction of roads and by regulating road traffic to shorten both the time and length of journeys, and facilitating the

access to the structures (sport halls, theatres, museums) that can be utilised to enjoy free time for one's self. There is a clear nexus between this capability and others, such as the capability to live a healthy life (consider the positive impact that sport can have on this) or the availability of training (considering the broadening of culture as a type of knowledge).

9. Participating in public life and living in an equitable society. On this capability are measured the functions of the local government which can influence participation in social life, political representation and access to positions of decision, and promotion of equal opportunities for women.

The proposed list does not give an order of priorities, nor is it immutable in relation to civil society. However it is drawn from the reading of policies and motivations contained in the various preparatory and budget documents and from discussion with administrators. The research group sees its role as providing the administration with a mirror in which to read its own image on the basis of its responsibilities for the well-being of the population both in overall terms and in single dimensions. So the list offers an occasion for the administration for reflection on its own being a mean with a service role with respect to the well-being of the people living in its territory, presenting an image that can be projected outwards and deconstructed according to the differences between subjects and their experience of well-being, as shown by the analysis of the context. Analysis of the budget can make more transparent the different relations of political power relationships.¹¹ This process of 'self-analysis' can be made to include a participatory process aiming to open also a public discussion on the sense of well-being and its dimensions, in which civil society, made up of organizations operating in the territory as well as single persons, can reflect collectively on their experiences of life and on their quality.

To broaden the approach to more local governments so as to verify the impact of their public policies on the living conditions of men and women residing in the area, a common list of capabilities and perhaps more extensive would be required. In this case, by reading the capabilities transversely, across local governments that act on the territory with different responsibilities and probably different policies, it is possible to

¹¹ By the term 'political' we here mean the politics of living conditions and the processes of social reproduction, not party politics.

work out how far the result derives in each case from a non-assumption of responsibilities or from incomplete action. The list of capabilities that would result from a process of this type should be more exhaustive and closer to the well-being of the inhabitants.

4. From budgets to women's and men's well-being: Rome Provincial District¹² and Piedmont Region¹³.

As we have seen, a first step in the implementation of the WBGB method is to define the field of analysis by identifying the important capabilities, chosen on the basis of the structure of the local government (section 3). The next step is to analyse the context with reference to the combination of the identified well-being dimensions, seen in a gender perspective. In analysing the context we encounter difficulties in applying gender auditing at the local level: often at this level the statistical investigations available at national level, based on sampling, have no statistical significance, or the local-government sources do not provide data on gender or variables that prove important for the analysis of the impact of gender (such as the distribution of unpaid work). To these difficulties are added those of measuring capabilities, shared with those who study human development: the shortage of primary sources of data on individual potential doings and beings and the need to use secondary sources to measure effective functionings. Currently at local level we have a heterogeneous collection of sources which allows an indirect estimate of capabilities through certain important functionings. However some statistical sources, mostly available with a certain degree of regional significance, enable us to measure states of deprivations in specific dimensions and their cumulative impact on other dimensions.

To show how a gender analysis of capabilities can be conducted, we list the observable indicators of functionings which have been used in applying the WBGB to the budgets of the Rome Provincial District. In this phase, as well as showing empirical data ('functionings') that show effective doings and beings of women and men, we can indicate also some conversion factors relative to the Province – i.e. social context factors, under the administration's responsibility, that can influence individual processes of conversion of means and services into actual well-being.

¹² With the kind permission of the Consigliere di Parità (Equal Opportunity Office) we use information contained in the Studio propedeutico per il Bilancio di genere della Provincia di Roma (Preliminary study for the Gender Budget of the Rome Provincial District), yet to be published.

¹³ We use information on the budget analysis of the Piedmont region published in Badalassi (2007) for Piedmont Region.

Table 1: The analysis of context: functionings and conversion factors by specific capabilities

Access to knowledge

Resident population by maximum level of education (functioning)

Enrolments in secondary schools and university (functioning)

Pupils in training courses (by type) (functioning)

Visitors to museums, exhibitions (functioning)

Spectators at concerts of classical music, opera, ballet and theatre (functioning)

Users of libraries (functioning)

Schools by level and potential attendance (conversion factor)

Museums, theatres, cinema and libraries per inhabitant (conversion factor)

Living a healthy life

Life expectancy and degree of health (functioning)

Invalidity and disability (index of deprivation)

Waiting lists for medical specialists (conversion factor)

Hospital beds per inhabitant (conversion factor)

Working and doing business

Employment rates, qualifications, and types of contracts (functioning)

Duration of employment in unstable jobs (index of deprivation)

Duration of unemployment (index of deprivation)

Resignation or dismissal within the first year of a child's life (index of deprivation)

Employment income (functioning)

Entrepreneurs by type of business (functioning)

Hours of paid and unpaid domestic and care work (functioning and conversion factor)

Access to public resources (services and transfers)

Subsidies and transfers paid directly by the administration (functioning)

Other observable subsidies and transfers (CIG, invalidity, child benefits...) (functioning)

Criteria of selection for access to local government services (conversion factor)

Living and working in adequate and secure places in an eco-compatible environment

Home accident rate (index of deprivation)

Employment accident rate (index of deprivation)

Violence and petty crime (index of deprivation)

Atmospheric pollution (conversion factor)

Travelling within the territory

Mobility (functioning)

Extent of means of public transport (conversion factor)

Road system (conversion factor)

Care of others

Care work (functioning)

Parental leave (functioning)

Presence in the area of public and private services for children (conversion factor)

Number of children and old people needing care (family variable)

Dismissal within the first year of a child's life (index of deprivation)

Availability of social voluntary work (functioning)

Care of oneself: time, culture, sport and recreation

Use of time in recreational and cultural activities (functioning)

Audiences for shows and museum visitors (functioning)

Users of gyms and sports centres (functioning)

Availability of green spaces (conversion factor)

Museums, theatres, cinemas and libraries per inhabitant (conversion factor)

Extent of sports facilities (conversion factor)

Availability of cultural and recreational spaces in the area and their accessibility (conversion factor)

Participation in public life and living in an equitable society

Access to elective positions: representation in elective and consultative assemblies (functioning)

Access to political roles: administrators of local governments and public companies (functioning)

The important indicators of functionings are then disaggregated by gender, and one proceeds to analyse the gender gap to bring out the observable inequalities. In this quantitative analysis we also show the results of qualitative investigations conducted in the area under study; these are necessary for a wider reading of the phenomena shown. To demonstrate one application of the approach to the context analysis, we offer some considerations regarding the ability to work and do business in the province of Rome. Analysis of specific employment rates by sex and territory has shown a difficulty

in the possibility of converting a potential capacity (which we cannot observe directly) into actual functionings. The possibility that the lower rate of women's employment derives from obstacles women encounter in greater measure than men, when they want to use their abilities and find a job, finds a primary indicator of 'deprivation' in the difference of unemployment rates. On average, the rate of unemployment in the province of Rome is in line with the national one, but that of women is higher. The greater weakness of women in terms of looking for work also appears not only from the elaboration of data from sample-based sources (ISTAT data on the labour force), but also from administrative sources (applicants and those who find jobs at provincial employment centres). The indicators to use for reference in measuring the realisation of capabilities for work relate not only to access to employment (a dimension which we consider particularly important for the provincial administration, given the powers assigned to it) but also to the way paid work is carried out: to what levels, with what timetables, what contractual modalities, what conditions. Unfortunately the present information system at provincial level often does not allow us to carry out an adequate analysis with regard to many dimensions of working conditions.

However, when the variables observable at provincial level are measured, it is clear that there exists a gender bias, to the disadvantage of women, in access to top positions and in standard working modalities (full-time and indeterminate). The greater importance for women of non-standard contractual modalities is a signal, to the economic policy authorities that set themselves targets for equality, of the urgency of adopting policies to guarantee the stabilisation of labour, for instance, by offering non-standard workers more access to training so as to increase the likelihood that when they accept non-standard jobs, when entering or returning to paid employment, they will not find themselves in a trap that is hard to get out of. The analysis of individual time budgets has also shown the importance for women, even in the province of Rome, of unpaid housework and care work; in fact on average women spend about 15 hours a week on the care of children or other relatives, and about 13 on housework (Office for promotion of the quality of life in the Province of Rome, 2005, Chapter 2, Section II). The number of hours of women's housework and care work does not seem to vary significantly with their professional status, which shows the importance of women's double role also in Rome.

The burdensomeness of paid work is shown partly by the higher number of women who consider the total hours excessive (Office for the promotion of the quality of life, 2005, pp.164-7), and by the limitations on participation in on-the-job training courses outside

normal working hours. We take these as indicators of a greater burden for women of time spent on unpaid domestic and care work, a fact that should be considered by those designing a labour policy and implementing it.

Context analysis brings out information gaps, differences and inequalities of gender with respect to capabilities singly and together; hence it provides the administration with an image of the reality on which to intervene, and gives administrators and civil society a view of the critical nature of certain dimensions of women's and men's well-being on which to reflect in political and public participatory forum. With context analysis the study can also take account of real processes of conversion of means into effective functioning, with reference to policies implicit in the data shown for different dimensions of life. Thus it is an essential tool for reading budget documents and for evaluating policies in terms of the well-being of those who live in the area.

In reading budget documents from the point of view of the WBGB one can use matrix methods linking monetary expenditures to the political objectives of the policies to evaluate their different impact on different subjects, relating the local public administration with the women and men directly or indirectly involved in political choices. In particular, this method defines a 'matrix of capabilities' by crossing the columns of capabilities considered important for the territorial context with the rows of the organizational structure of the local government itself.

The list of capabilities and organizational structures will differ between local governments, so a different and specific matrix is required in each case. The matrices are constructed to take account of the structural characteristics of each administration, involving, as we said in the previous section, not only the juridical framework but also the specific programmatic and political objectives and policies and the characteristics of each area. In the case of the Province of Rome presented here, we have chosen not to include on the rows of the organizational structure the *Assessorati* or Centres of responsibility of expenditure, but to take the Predictive and Programmatic Report of the Province as the point of departure for constructing a matrix of capabilities and areas of activity of the administration. The matrix is completed accounting of current expenditure, ordered, when possible, by capabilities. This demonstrates how matrices can be used as a tool for shifting the analytical field from the administrative structure directly to the well-being of the resident population, thus correcting the present distortion in the relation between means (allocated resources) and ends (well-being), and reversing its direction, at least at symbolic level.

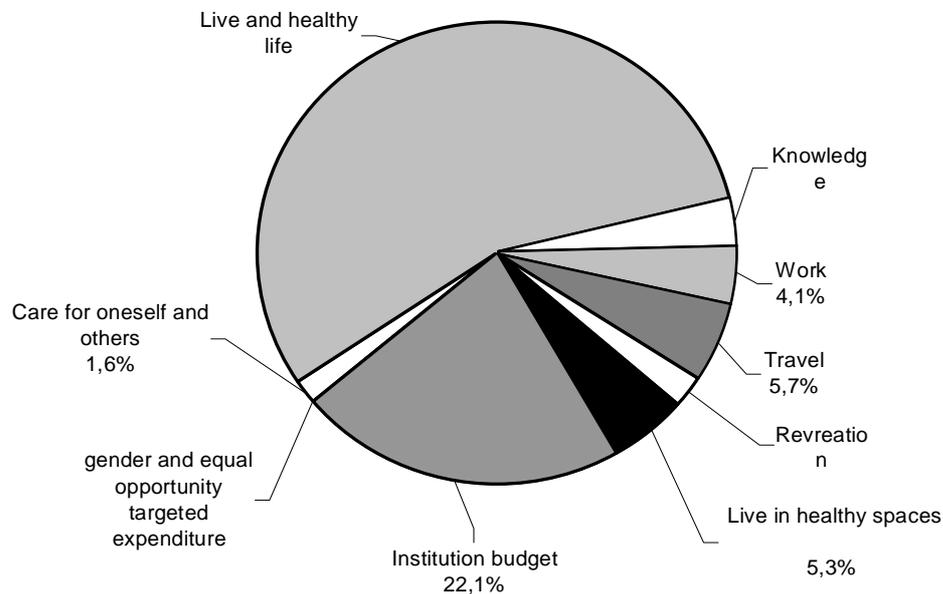
One problem encountered in using the matrix regards the attribution of single capabilities to the different functions of the administration. The method followed is to attribute capabilities to the areas or sectors or departments to which they primarily belong. For example policies affecting labour correspond primarily to the capacity to work, policies for transport to the capacity to move about the territory, policies for training to the capacity to acquire knowledge, health policies to the ability to live a healthy life. This attribution permits a repartition of expenditure according to specific doings and beings so that the administration can reflect on the effect of expenditures on specific dimensions of the well-being of citizens, and evaluate their consistency not only with its administrative functions but also with its political, programmatic and legal lines. Applying this criterion has also allowed a repartition by capabilities of current expenditures in the final budget of the Piedmont Region, as indicated in Figure 3

Table 2 - Matrix of capabilities of the Province of Rome

Capabilities	Access to knowledge	Live an healthy life	Work and carry on business	Access to public resources	Live and work in adequate and secure space and in eco-compatible environment	Travel	Caring for others	Caring for oneself: time, culture, sport and recreation	Participating in public life and living in an equitable society
Budgets Items									
Environment					12,431,155.38				
Mobility						5,672,375.77			
Debt cost									
Human resources			144,503,500						
Labour and Economy	26,629,337.61		37,422,858.29						258,769.36
Welfare	9,459,173.93		8,529,613.10				58,962,108.15	8,919,680.95	
Culture, Sport, Tourism, Leisure									

Source: Gender Budgeting Province of Rome (forthcoming)

Figure 4 Distribution of expenditures by capability – Piedmont Region, 2006



Source: Badalassi (2007)

However, with regard both to the interaction existing among the different capabilities, and to the different responsibilities of each sector, we note that often the action of several sectors or policies can bear on the same capability.

For example:

- Labour policies can directly influence the ability to work and do business, but also, insofar as they allow accumulation of human capital on the job, they influence the ability to know and be educated.
- Training policies also favour the ability to work and to access resources, insofar as they positively affect the probability of employment of the trainees.
- Health policies can affect not only the capability to live a healthy life, but also the capability to care for others.
- Transport policies, insofar as they facilitate mobility between places of living, can influence not only the capability to move about but also the capability to give care, to work, to live a healthy life and to enjoy beauty.

An analytical accounting that refers to the specific objectives of the various projects can permit a more detailed distribution of expenditure for several capabilities within the same sector, also bringing out the existence of a

network mode of operation, not only in administrative processes, but also in the system of governance and management of political power.

Thus we show how each *Assessore* and his or her Department, while being responsible for the capabilities associated with their primary role - for example the *Assessorato* of mobility and transport deals with the capacity to move around the area - also becomes responsible, along with his or her colleagues for the effects of transport policies on the accessibility of the workplace, on times management (Rome experimented a City Time Plan) and on the policies for work-life balance with regard to male and female passengers.

This opens a space for integrated political intervention with enormous potentialities in terms not only of increased well-being for women and men, but also in terms of rationalising expenditure in a better cost/expected benefit relation, and of increasing the value of public resources in regard to the residents' quality of life.¹⁴

Therefore the classification of budget figures by capability involves an analysis of the direct or indirect impact of gender on the development of recognized capabilities. In this phase, apart from identifying the impact of gender we propose suggestions for policies in strict relation with the critical aspects that emerge from the context analysis on the development of capabilities from the gender perspective. Thus for example we have analysed at local level the criteria for access to children's services which, according to the approach adopted, can be considered important factors in conversion of the mothers' (and fathers) capacity to work into actual employment, bringing out the need to create easier access for one-parent families and to avoid penalising the children of non-standard workers through difficulties of access. As well as classifying expenditures in relation to capabilities and to the impact of gender, some budget figures, adopting the principles of accountability based on well-being, also change their definition: for example expenditures for training no longer figure as current expenses, but become an 'investment' in

¹⁴ In the case of the Provinces of Bologna and Rome, matrices have also been constructed crossing citizens' capabilities with specific activities instituted by the administration, for example planning, communication, allocation of resources, networking, etc. Also in the case of these activities, the necessary integration of dimensions of life of those who live in the area creates the need for a cooperative logic in the administration's organizational structure: while I plan I must bear in mind the real conditions of life, and when I communicate I must bear in mind the actual processes of access to information for different people.

capabilities. This conceptual change, with which expenditure on human development takes on the characteristics of 'investment' (normally applied only to spending on infrastructures and 'things'), has more contemporary relevance if one takes full account of the increasingly service economy that shifts the centre of added value from productive capital to human capital. The emphasis on people and on gender differences in the development of individual capabilities allows us to measure the effect of budget policies on resources at local level, taking account also of the need for coordination among different authorities operating on the same territory. Consider for example the reduction of time spent in hospital by patients, which burdens families, especially women, with the work of caring for convalescent patients. This transfer of costs is invisible unless the analysis of individual time budgets and the different distribution of care work by gender are taken into account. In our view, moreover, only an integration of regional policies (concerned with health) with local policies (concerned with domiciliary care) can guarantee that the political space for intervention that would otherwise be lost, in passing from the public dimension of service (the hospital) to the private one (home care), will not be left unfilled. The capability approach makes visible the costs, in terms of development of individual capabilities of care-giver and care-receiver, and the gender approach clarifies who are the actors in the process of care and who are the subjects most exposed to a risk of deprivation in some dimensions of human development

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