

On Sustainable Human Development: Gender Auditing in a Capability Approach

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Abstract: An important social dimension of sustainable human development is gender equity. Women's increasing exclusion and vulnerability require not only targeted government spending for equal opportunities between sexes, but also gender-sensitive policy making. Feminist studies have developed several tools to assess the gender impact of public policy and, in particular, of public budgets. They commonly audit the gender impact of public policies by analyzing public spending through elementary indicators. Their starting idea is that without systematic gender auditing, public policies may generate new (or perpetuate old) inequalities between men and women. According to the Capability Approach, a multidimensional auditing methodology is needed to assess the impact of public policy on women's well-being.

In this paper, we introduce an innovative approach to Gender Auditing (GA) of public budgets inspired by the capability approach. This approach has been experimented in a recent attempt to develop gender budgets in Emilia Romagna (Italy) with reference to the Region and to Modena Municipality and Provincial District. Different tools have been designed and experimented. In particular, at regional level, individual well-being is defined in terms of extensions of capability sets and inequalities are seen as multiple dis-functionings in a social space where women are disadvantaged in terms of access to resources, education, health, control over their bodies. Hence, by identifying some dimensions of women's empowerment and some public policy domains, we build a GA matrix together with some simple indicators for GA. At provincial level, the list of capabilities used to define a multidimensional well-being is derived from the capabilities implicit and embodied in the administrative structure and assumed as political responsibilities of the local government with regard to the well-being of residents. The methodology used for the Provincial District is an *extended reproductive well-being approach* that not only challenges women's inequality but also introduces a new concept of sustainability in the light of women's experience of the fragility of dominant subjects and of the normality of the actual economic system. Finally, at municipality level, the focus is set on the net of institutions that cooperate to guarantee local well-being and particular attention is given to the capability of caring.

. Introduction **

Sustainable Development (SD) is a composite concept. Its definitions and interpretations usually comprise several dimensions. Since the Brundtland Report (WCED, 1987), the ongoing concern for SD has focalized on three crucial ideas: (1) inter-generational equity (i.e. meeting present generations'

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needs without compromising future generations' ability to meet their needs), (2) poverty alleviation and (3) environmental conservation.

In a neoclassical perspective, inter-generational equity is usually defined in terms of non-declining consumption levels among generations (Solow,1994), poverty reduction is largely neglected¹, and environmental resources are summarized in an overall stock of natural capital. Such a stock of resources constitutes one component of a larger capital vector that also includes information about technological, human and social capital stocks. These vector components are largely seen as substitutes in the sense that a decrease in one vector component is generally allowed while it is balanced by overall welfare-preserving increases in one or more other dimensions (Serageldin,1996).

In the last decade, ecological economics has strongly emphasized that even if the environment is regarded as a capital resource, specific features of the ecological problem (i.e. irreversibility of some ecological damage; discontinuities of environmental costs with respect to increasing human disturbances over the ecosystem; limited resilience capacity of the environment) suggest that we move from a weak sustainability perspective (like the neoclassical one) to a strong one in which no substitution among capital vector components is allowed. Hence, no depletion of natural capital must be permitted and the earth's carrying and resilience capacities must be kept intact over time².

As Rao (1999) proposes, an ecologically strong definition of sustainability

can be narrowed down to the implications for the economic arena. This approach suggests that we can draw upon the economic and ecological resources to such an extent that the generalized economic and ecological capacity to produce material and immaterial well-being of the human population is retained intact for ever (in Rao (2000), p.91, italics added).

The last definition of SD is crucially linked with the notion of sustainable human development recently used by Anand and Sen (1995) or with the interpretation of what identifies SD advocated by Gladwin *et al.* (1995). The latter explicitly define SD as

the process of achieving human development in an inclusive, connected, equitable and secure manner (in Rao, 2000, p.89).

where, as may be pointed out,

inclusiveness implies human development over time and space, connectivity entails an embrace of ecological and economic interdependencies; equity refers to both inter-generational and intra-generational and also to inter-species fairness (Rao (2000), p.90, italics added).

¹ This point is recognized by Solow in his contribution to the UNDP Human Development Report (1996).

² For a well-detailed discussion on this issue see Rao (2000).

A new characterization of the idea of SD does emerge. Firstly, it needs to be addressed to human development. Secondly, it does require appropriate and direct intervention against social exclusion and poverty to the same extent as it imposes not only equity among generations but also equity within a generation, i.e. among social groups. As emphasized by the OECD's Director for Social Affairs, John P. Martin (2001), intra-generational equity refers to the ability of a social system to maintain social cohesion and to avoid irreversible social problems, and is a crucial dimension of development.

The issue of gender inequalities must also be viewed from exactly the same perspective. Women's social exclusion and their generally high vulnerability (in both developed and developing countries) are dramatic examples of how intra-generational inequalities may result in human suffering, loss of freedom and a generalized limitation of opportunities for human development³. Given women's vulnerability throughout the world, it has been argued that the achievement of gender equity requires not only government spending targeted on equal opportunities between sexes, but also gender-sensitive policy making (Elson, 1993).

Feminist studies have developed several tools to assess the gender impact of public policies (among others Elson, 1993, 1994) and, in particular, of public budgets (Budlender, 1996; Sharp, 1997; Elson, 1998). Their starting idea is that without a systematic gender-auditing exercise, public policies may generate new (and/or perpetuate old) inequalities between men and women. Hence, they propose auditing of the gender impact of public policies by analyzing public budgets through elementary spending indicators. Their focus is mainly on the utilization of public resources in the cause of gender equity or with the aim of increasing the efficiency of the policies analysed⁴, rather than the level of human development that those expenditures enable women to achieve.⁵

Nevertheless, we believe that, consistently with the notion of *Sustainable Human Development (SHD)* and accepting the need to introduce some auditing tools for rendering policy-makers responsible for the gender impact of public policies, a multidimensional auditing model must be developed in order to deal with the multidimensional notion of well-being⁶.

In accord with Sen and Nussbaum's Capability Approach, individual well-being is here defined by a vector of functionings and gender inequalities that may be seen as multiple dis-functionings in a social space where women are disadvantaged in terms of access to resources, education, health, control over their bodies and lives and so on.

³ See, among others, Li (1995), Valdes (1995) and Chen (1995) for regional studies of women's human development conditions. See also Lazar (1995) for a discussion of the impact of sexism on women's self-image and self-esteem and the consequences for sustainable development. Lastly, the so-called *feminilisation of poverty* is discussed in depth in Beneria and Bisnath (1996) and in Razavi (1999).

⁴ See Budlender, Sharp and Allen (1998) and Himmelweit (2002).

⁵ The link between the capability approach and gender inequality has been recently analysed by Robeyns (2003) and Chiappero-Martinetti (2003).

⁶ For an interesting discussion of different dimensions of human development in modern social sciences see Alkire (2002).

In this essay, a framework for gender auditing in a Capability Approach is introduced with respect to three different institutional levels in Emilia Romagna (Italy): the Regional Government, the Modena Provincial District and Modena Municipality. For the Region, taking into account the huge literature on gender studies, in Section 2 we define a list of basic functionings and gender-empowerment dimensions. Thus, across public policies and gender-empowerment dimensions it is possible to get an auditing matrix (Section 2.2) in which policies and functionings are interrelated and seen in a gender perspective. Moreover, in order to disclose systematic gender inequalities, for illustrative purposes, a group of simple indicators is suggested (Section 2.2.2).

In section 3, a different well-being approach is used to audit the Modena Provincial District budget from a gender perspective. First of all, the list of capabilities used to define the dimensions that compose well-being is drawn from the policies that the District designs and implements. These policies are basically embodied in the division of labour among the 9 Departments in which the District is organized. We see policies as an assumption of responsibility by the local government with regard to a certain state of well-being considered adequate and acceptable for residents at local level. The Departments' functions and their programs are then translated into the capability language that is already part of the political rhetoric but is not assumed as an evaluative method. The quality-of-life language is more directly understandable by residents since they are the subjects whose capabilities are at stake. A multidimensional well-being approach provides an interconnected common evaluative space that clearly shows that each Department contributes to enable residents to have access to several capabilities, but also that each capability, included in the list, is formed and sustained through the action, and as an assumption of responsibility, of different departments.

The well-being approach used to develop a methodology to audit the Modena Provincial budget not only expands the notion of standards of living from a commodity-based to a human-development one, but also redefines the notion of sustainability from a feminist perspective. In fact, it extends the capability approach to include in the process of reproduction of individual capabilities also unpaid domestic work (measured by national statistics as slightly bigger than the total men's and women's paid work, UNDP, 1995; Picchio, 1996, 2003) and the capability of caring for people. This extension allows for a new definition of sustainability that also includes the reproduction of bodies, perceptions and social relations and, in general, requires that material, symbolic, structural and ethical dimensions be retained in the same picture of the development process of individuals and society. Women's experience in coping daily with the vulnerability of bodies and emotions of other individuals (adult men included) and with the burden of having been given, historically, the final responsibility for the quality of life is used here in a *reproductive well-being approach* to disclose some ambiguities in the vision of human development which are not usually detected in a perspective of equal opportunities.

Finally, the aim of section 4, is to experiment the capability approach used at regional and district level for auditing the budget and policies of Modena municipality. In particular, we try to assess the contribution of the municipality to the urban quality of life and to focus on the specific capability of caring and on the empowerment dimension of controlling one's time and work⁷.

2. Regional Governments: Core Values, Functionings and Gender Auditing

Any assessment of public policies' effects on gender equity, and hence any gender auditing practice, has to be undertaken once an evaluation space (*metric*) for living conditions, as well as gender-equity targets of development, are specified.

As well established in the literature⁸, human living conditions are unlikely to be realistically represented using utility or income as reference metric. Firstly, measuring standards of living using utilities supposes that all human needs can be reduced to a need for utility, an assumption clearly not realistic. Secondly, whereas pervasive inequalities between individuals in terms of economic and social *entitlements*⁹ exist, some agents might not be able neither to possess crucial resources for development, nor to convert these in an higher level of quality of life. Finally, desires and preferences, usual primitive concepts in income/utility-based approaches, are known to adapt themselves to deprived and unfair living conditions distorting any evaluation of standards of living (Nussbaum, 2002).

Hence, in defining what human living conditions represent, Amartya Sen's version of the Capability Approach proposes employing as primitive notion the concept of functioning and as evaluative space individual capabilities to function.

In Sen's own words, functionings represent

parts of the state of a person-in particular the various things that he or she manages to do or to be leading a life (Sen (1993), p.31).

Existing conceptual differences among functionings, commodities and utilities may be easily explained using a famous example:

⁷ While introduction and final remarks are the joint work of the three authors, the sections following must be attributed separately and in particular, Section 2 to Diego Lanzi, Section 3 to Antonella Picchio and Section 4 to Tindara Addabbo.

⁸ On this fairly well-known issue see Sen (1983), (1985), (1993) or, more recently, Quizilbash (1998).

⁹ The concept of entitlement has been introduced by Sen (1981) with respect to access (in terms of right, opportunity and possibility) to material resources. In a more general sense, we may see social entitlements in terms of access to non-material and social resources. These are profoundly related with customs, social norms, traditions or within-group rules of behaviour.

important differences exists between a bicycle, the riding of the bicycle and any mental state or utility that accompanies the riding. The bicycle itself is a mere object, a commodity. I may own the bike, be near it, and be sitting on it and yet not be riding it. To be riding the bike is to be engaged in a purposive human activity with or by means of the bike [...] The cycling, as both process and result, is an achievement of the rider [...] while riding, the cyclist may or may not be enjoying herself, satisfying desires or getting utility out of the activity. (Crocker, 1995, pp.153-54, italics added [this example was originally in Sen,1984, p.334]).

Hence, any human being has some valuable functionings which constitute his/her relevant dimensions of development. Individual well-being may be consistently defined either in terms of the vector of achieved valuable functioning (*attainments approach*) or in terms of the set of achievable functionings (*option approach*). The choice is generally determined by how this concept must be applied. In applications to non-income poverty phenomena, the first definition allows individual attainments to be compared with respect to some representative functionings. On the contrary, in designing public policies for equal opportunities for human flourishing, a less focalized set-oriented notion of well-being might be more appropriate. Respectively, in the first case improvements in the quality of life are measured by increases in a valuable functioning, in the second case by an option-set expansion¹⁰.

Valuing in gender-auditing practices as crucially important positive freedom suggests that individual well-being be defined in terms of what Sen calls capability set which

represents the freedom that a person has in terms of available functionings given his personal features and his command over resources (Sen,1985, p.13).

Thus, if multidimensionality matters, this set may be used as evaluation space for *human development* defined as the expansionary process of human capabilities to function (Sen, 1989) as well as for planning, implementing and auditing public policies with respect to developmental issues.

Note that Sen's approach is, as Glover (1995), O'Neil (1995) and Crocker (1995) pointed out, vague as to what constitutes a valuable functioning. Without specifying a principle of justice (in the Rawlsian sense), a list of human needs (Stewart, 1985), or without describing what can be normatively and universally accepted as signs of human flourishing (Nussbaum, 1988, 1995), Sen's proposal is not closed and thus not operative. Hence, from different viewpoints and using several normative criteria, many lists of valuable human functionings, also called dimensions of human development, have been proposed. A survey of these is presented by Alkire (2002). Intersecting the entries of these lists by taking those which appear in at least two of them, we may identify some human core values. We define these both in a Finnis sense, i.e. *reasons for acting that do not ask for reasons*; (see Finnis, 1999) and in a Griffin sense, i.e. *universal values which make individuals reciprocally intelligible and understandable* (see Griffin, 1996,

¹⁰ On this technical issue see Pattanaik and Xu (1990) and Barberà, Pattanaik and Bosset (2001).

Quizilbash, 1998). They tell us what individuals (at least scholars!) value as crucial in their life and they might be locally refined by norms, traditions and other culturally specific factors. Thus, to each core value we may associate some relevant functionings on which assessments on human living conditions can be undertaken.

In Table 1, human core values and related functionings are listed¹¹.

| Domains | <i>Basic Human Values</i> | Related Functionings |
|--------------------|------------------------------------|---|
| Body | <i>Healthy Life</i> | Body Integrity and normal life span |
| Body + Mind | <i>Safety</i> | Physical and Psychological Safeties, Environmental Security |
| Mind | <i>Aesthetic Experience</i> | Imagination, Symbolic reasoning, Aesthetic perception |
| Mind | <i>Knowledge</i> | Comprehension, Education and Learning |
| Mind | <i>Emotions</i> | Emotional development, play, recreational opportunities, hedonistic pleasures, curiosity |
| Relations | <i>Integration and Affiliation</i> | Mobility Self-respect and dignity Empathy Respect for the Nature and the other species |
| Relations | <i>Expression</i> | Freedom of religious, artistic, cultural, political speech and exercise, critical conscience Control over values, wants, needs and opportunities |
| Relations | <i>Participation</i> | Political Voice Free association |
| All | <i>Power over resources</i> | Hold Property, Have skill-oriented employment, Access to and control over public and private resources, caring |

Table 1 - Core Human Values and Related Functionings

As may be noticed, human values and functionings are referred to four domains. Firstly, body integrity, physical, psychological and environmental safeties, as well as to have a normal life span, stands for body-related

¹¹ This list aims to be heterogeneous, tentative and open-ended like that of Nussbaum.

valuable functionings. Secondly, imagination, symbolic reasoning, emotional development, hedonistic pleasures are, *inter alia*, mind-related functionings linked with non-material values like comprehension, aesthetic experience or emotion. Then, core values like integration, participation and affiliation (and related functionings) refer to human beings' social relations, i.e. the complex process of relation between the self and others inside social institutions (like groups, communities, governance structures and so on). Hence, these domains include intrinsically valuable functionings which define and model individual selves, relations and identities.

Finally, power over public and private resources is seen here as an instrumental value. Its related functionings, like being able to hold property, having a skill-oriented employment etc., refer to necessary capabilities to function for achieving other core values. This domain enlarges, including valuations of individual socio-economic entitlements, those capabilities of Nussbaum's (1995) referring to the satisfaction of needs for food, drink and shelter. Thus its related functionings give us information about the individual ability to have access to formal and informal institutions where allocation and distribution of resources take place. As will be clearer in the next section, these domains coincide with some empowerment dimensions which may be included in gender-auditing processes.

2.1 Gender Relations and Women's Empowerment

Whereas human development is assumed as the point of reference for planning, managing and auditing public policies¹², it must be recognized, if gender justice matters, that there do not exist two different norms of development for men and women separately. On this, we basically agree with what Nussbaum (1995) wrote. We may assign to males and females the same list of valuable functionings, even if men and women probably exercise these functions differently or in different spheres of life. Since biological differences between genders are few and mainly related to the sexual sphere¹³, these differences in the exercise of valuable functionings should be explained in terms of relative exclusion and deprivation of female human beings sustained by distorted social norms.

As gender studies have strongly emphasized¹⁴, gender is a plural concept. On the one hand, gender differences are generally due to different roles and responsibilities between males and females in three spheres of life: *productive* (market production, home production etc.), *reproductive* (childbearing, caring, domestic tasks) and *community management* (provision and maintenance of collective resources). In almost all countries,

¹² This is the case of the Emilia-Romagna Region in the introduction to the DPEF 2002-2005. See RER (2002).

¹³ See Schofield (1992) for a pleasant survey on contributions which testify how no biological diversities, other than those related to pregnancy, have any scientific support.

¹⁴ For a survey on gender theories see Miller and Razavi (1998).

reproductive and community management activities fall heavily on women, without their being acknowledged, valued or paid¹⁵. These gender-ascribed roles involve large disparities in terms of total work, responsibilities, social visibility, or leisure time and opportunities to achieve some valuable functionings (like political participation or recreation)¹⁶.

Disparities between men and women are not only socially embedded and historically and culturally determined, they are created and reproduced by ongoing differences in the positioning of the two sexes in social processes (Kabeer 1994). Gender relations are socially shaped and usually distorted in favor of males by discriminatory norms, institutions, traditions and standards of behavior¹⁷. Such a distortion is due to several reasons. Firstly, men historically control power positions within society. Secondly, male human beings generally use physical or psychological violence, inside and outside the household, in bargaining with women for resource control and division of work, time and responsibilities. Thus gender inequalities result from cooperative/conflicting disputes between sexes (Sen, 1995) and bargaining processes in which women usually have weaker power (Elson, 1993).

In this way, structural and social inequalities preclude women from full human flourishing. They need to be detected and eliminated if women are to be enabled to exercise their autonomy and their positive freedom. Gender-ascribed roles, as many authors stress¹⁸, involve women in the lack of access and control over resources, a coercive division of labor, devaluation of their work, reduced leisure time and participation in social or group activities and a general lack of control over mobility, body integrity, safety and self-respect. Hence, transformations for gender equality in public policy planning and auditing processes envisage some *empowerment (and self-empowerment) dimensions* for women. In so doing a possible taxonomy may be obtained by taking body, mind and relation (above domains of human core values) as basic spheres of women's relative material and immaterial deprivation. In this way, women's empowerment dimensions may be defined consistently with the relevant functionings shown in Table 1. This new list should include, among others, control over private and public resources, control over their body, labor and time, access to political and governance spaces, access and control over intangible resources, control over their physical mobility¹⁹. Finally, some empowerment dimensions for gender auditing must be locally selected on the basis of women's living conditions, discussions with female groups and associations, and political priority assigned to some human development dimensions.

In next sub-sections, we introduce a multidimensional model for Gender Auditing (henceforth GA) of public policies managed by a *regional representative institution* (e.g. a representative parliament with legislative

¹⁵ The relationship between unpaid work and the economy is analysed with regard to the Italian case in Picchio, ed. 2003.

¹⁶ On this issue see Moser (1989), (1993).

¹⁷ Among others, Lazar (1995) notices that different gender roles and norms of behaviour are generally ascribed by parents to boys and girls during infancy.

¹⁸ See among others Elson (1994).

¹⁹ A similar list can also be found in Gurusurthy (1998).

powers and macro-micro economic policies managed by a council with executive powers). It deals with multidimensional deprivation in the space of capabilities and takes its logical cue from our notions of human development, human core values and dimensions of women's empowerment. It also provides an extension of current methodologies for GA proposed by some feminist economists (see Elson, 1998 and Sharp, 2000). As stressed above, traditional GA models are mainly focused on how public resources are used for goals of equal opportunities, gender equality or efficiency of public policies. Thus, firstly they work in the space of income, secondly, they measure only public expenditure for gender equality or efficiency aims, rather than measuring the level of human development that this expenditure allows women to achieve. Still, whether inequality is a multidimensional problem (as commonly accepted since the 1980s) or not, a multidimensional GA framework is needed to plan and assess public policies with regard to equal opportunities of well-being.

2.2 A Model for Gender Auditing in a Capability Approach

So far, we have discussed the theoretical foundations of GA in a capability approach. Let us now move to a more constructive proposal. In this section we take as general reference the dimensions of women's empowerment indicated above. We shall firstly cross them with the main domains of the auditing of public policy interventions in terms of gender equity. Then, we shall propose a set of simple indicators of gender equity.

Before doing so, some preliminary observations are necessary. First of all, our GA model may be seen as an extension into capability metric of consolidated GA methodologies. This enlargement has been recently suggested by Elson (1998). She emphasizes that a human-centered pattern of development is required to integrate gender into the appraisal of overall budget strategy and medium-term economic, social and political planning. In other words, gender equality being multidimensional, it is necessary to evaluate the impacts of public policies on several aspects of women's life from the availability of leisure time to unpaid work, from women's educational skills to their participation in governance institutions. In this context, the capabilities-oriented GA model we propose may be a useful tool.

Secondly, we suggest a set of elementary indicators for GA. This choice is consistent with the European Union's recent approach in measuring social exclusion²⁰. Simplicity, intuitive validity, responsiveness to effective policy interventions and practicability are some principles applied to social indicators. Generally, they aim to make indicator sets easily understandable and practically useful for policy makers. Our proposal must be viewed in this perspective.

²⁰ On this issue see Atkinson *et al.* (2002).

2.2.1 The GA Matrix

As outlined above, the choice of some *politically accepted and locally specified* dimensions of women's empowerment is needed in order to undertake a meaningful GA exercise. Too large a set of dimensions would mean that the exercise lost tractability and required large administrative costs. As against that, choosing too small a set could mean losing, in GA exercises, several crucial dimensions of human development. Fine tuning is surely required. For illustrative purposes, we assume that three dimensions of women's empowerment have been chosen by a regional government²¹

- A1): Control over and access to public and private material resources
- A2): Control over and access to non-material and cognitive resources (knowledge, education, services etc...)
- A3): Participation and active citizenship

Hence, in order to identify relevant public interventions with respect to women's empowerment, we can cross dimensions (A1)-(A3) with the main domains of public policies. Following an intuitive taxonomy for public policy and planning, we might distinguish:

P1): *Institutional Policies*, generally related to definition and legal implementation of citizenship rights and obligations in the civil, social and political sphere. They include *milieu policies* aiming to produce cultural and social changes in the organization of productive, reproductive and community-management activities and governance policies too.

P2): *Macroeconomic Policies*, i.e. management of public expenditure, taxation regimes and social security schemes

P3): *Meso and Microeconomic Policies* like regulatory regimes, commercial agreements, targeted benefits or subsidies.

Joining (A1)-(A3) with (P1)-(P3) gives us a GA matrix whose entries are public interventions which must be audited using budgetary information or other information sources. The matrix is presented in the following table.

Looking at Table 2, it may be noticed that for some entries, like conciliatory policies, social recognition of unpaid work or general gender awareness of laws and directions, a qualitative analysis is unavoidable. For others, like participation in governance bodies, public expenditure or mean-tested conferred benefits, a more quantitative evaluation may be possible.

²¹ A similar short list is proposed by Sen (1997), (1999) for basic functionings in developmental processes as well as by Unifem (2000) for basic women's empowerment dimensions.

| GENDER AUDITING Matrix | P1 | P2 | P3 |
|------------------------|--|--|---|
| A1 | <ul style="list-style-type: none"> ▪ Laws and other dispositions ▪ Social Evaluation of unpaid reproductive activities | <ul style="list-style-type: none"> ▪ Provision of public goods and services ▪ Mean-tested benefits ▪ Taxation Regimes | <ul style="list-style-type: none"> ▪ Targeted Benefits |
| A2 | <ul style="list-style-type: none"> ▪ Laws and other dispositions ▪ Conciliation measures | <ul style="list-style-type: none"> ▪ Educational Services | <ul style="list-style-type: none"> ▪ Targeted Benefits |
| A3 | <ul style="list-style-type: none"> ▪ Laws and other dispositions ▪ Governance and Political Participation | <ul style="list-style-type: none"> ▪ Expenditure for equal opportunities | <ul style="list-style-type: none"> ▪ Targeted Benefits |

Table 2 - A GA Matrix

Expenditure for equal opportunities between sexes contains either direct or indirect expenditures in Sharp's (1997) sense. Moreover, gender-oriented analysis of taxation regimes is founded in the well-documented heavier effect of indirect taxation on women's controlled income²². Finally, target benefits are here viewed as extensively as possible: they include monetary transfers to recognized groups, associations and actors of the so-called *civil society* as expressions of social participation, educational/cultural publicly financed activities, as well as payments to unpaid workers.

2.2.2 Some Indicators for Gender Auditing

Once a GA matrix has been built, some objects of auditing are identified consistently with selected dimensions of women's empowerment. Nevertheless, assessment of the degree of gender equality of public policies does require some indicators which will enable men's and women's living conditions and the effects of public reforms or interventions on equal opportunities between sexes to be synthetically measured.

In this subsection, we mainly present and discuss some indicators for GA. Some of them are well-known indices frequently used in human

²² See Elson (1994), (1993).

development measurement (i.e. the poverty gap ratio, the school-enrolment ratio and the school-drop-out ratio). Others, on the contrary, are less usual and are a non-exhaustive and final proposal.

Furthermore, these last years have witnessed an extensive discussion about the case for a *multi-level approach* in designing indicators for policy planning and auditing. Our proposal is that there should be three levels of indicators for gender auditing:

- Level 1 would consist of a number of indicators of gender condition for the main empowerment dimensions that it is believed should be covered (see above)
- Level 2 would support level 1-indicators providing some synthetic gender equity indices. In principle, there would be no limit to the number of these measures, even if in order to avoid unnecessary proliferation two fairly well-known indices should be considered: the *Gender Empowerment Measure* (which assesses progress toward gender equity in agency and public life) and the *Gender Development Index* (which evaluates gender inequality in its overall assessment of aggregate well-being of a country or region)²³.
- Level 3 would consist of indicators for auditing public policies from a gender-equity perspective. These indicators generally refer to items included in the gender auditing matrix.

This three-tier structure has several advantages. Firstly, it collects information about both actual gender conditions and gender equity policies, enabling an informal consistency test between women's practical and strategic needs (Moser,1993) and the declared targets of public policies. Secondly, it contains both simple indicators and synthetic indices balancing multidimensionality requirements and the need for easily communicable statistics. Finally, this three-level bundle of indicators would provide an easy exercise both for evaluating the impacts of public policies on gender equity and for feedback for policy-makers' targets of human development.

Obviously, in building this set of indicators, some information will be obtained from socio-demographic statistics and some from public budgets and other normative dispositions. In the next table, some possible Level 1 indicators are briefly presented. As can be seen, the list takes inspiration from the indicator framework of the UN common country assessment (UN,1999) and almost all the indicators must be disaggregated by gender. In so doing, the Level 1 indicators provide the informational basis for the computation of the GDI and the GEM²⁴. Finally, Level 3 indicators are listed with respect to the gender matrix under discussion. Some of these have previously been proposed by Elson (1998), some others are built in a similar way.

²³ On these indices see UNDP (1995) and Bardhan and Klasen (1999).

²⁴ Since both indices are well-known and it is not our aim to review them, see UNDP's (1995) technical notes for details.

| | | | |
|---|---|--|--|
| LEVEL 1- INDICATORS OF LIVING CONDITIONS | | | |
| <i>Economic Well-Being</i> | <ol style="list-style-type: none"> 1. Per-capita income in PPPEuro 2. Extreme Poverty Ratio 3. Poverty Gap Ratio 4. Gender Income Inequality Theil Index 5. Unemployment Rate 6. Informal Sector Employment as percentage of total employment | | |
| <i>Education and Access to Knowledge</i> | <ol style="list-style-type: none"> 1. Enrolment Ratio in Primary and Secondary Education 2. Enrolment Ratio in Higher Education 3. Drop-out Rates 4. Ratio of Female to Male Literacy | | |
| <i>Participation</i> | <ol style="list-style-type: none"> 1. Share of paid employment in non-agricultural activities 2. Percentage of seats held by any gender in parliament 3. Percentage of managerial or professional positions held by any gender in private and public institutions | | |
| LEVEL 2- SYNTHETIC GENDER INDICES | <ol style="list-style-type: none"> 1. Gender Development Index 2. Gender Empowerment Measure | | |
| LEVEL 3- GENDER EQUITY IN PUBLIC POLICY INDICATORS | <i>P1</i> | <i>P2</i> | <i>P3</i> |
| A1 | <ul style="list-style-type: none"> ✓ Gender Targeted (henceforth GT) for balancing productive/reproductive activities ✓ Share of public contracts going to male-headed/female headed firms | <ul style="list-style-type: none"> ✓ GT Expenditure Ratio ✓ GT means-tested benefits Ratio ✓ Gender Access to Public Services Ratio | <ul style="list-style-type: none"> ✓ GT Income Transfers Ratio ✓ GT Expenditure for Business Support Ratio |
| A2 | <ul style="list-style-type: none"> ✓ Gender Conciliation Policies Expenditure Ratio | <ul style="list-style-type: none"> ✓ GT Basic Education Spending Ratio | <ul style="list-style-type: none"> ✓ GT Vouchering for Life-long Education Ratio |
| A3 | <ul style="list-style-type: none"> ✓ Gender Share of new Workers (managerial positions and normal positions) | <ul style="list-style-type: none"> ✓ Gender Inequality Reduction Expenditure | <ul style="list-style-type: none"> ✓ GT Expenditure for Social and Political Participation |

Table 3 - Some Indicators and Indices for GA

A crucial point is to determine which target values for indicators would be relevant for gender equity. Consistently with the Capability Approach, it might be necessary to orient public policies more firmly towards one gender,

whereas the absolute disadvantage of this in the space of capabilities goes deeper. Hence, it is basically important to describe and analyze, locally, how the social transformation process of public resources and accesses in enhanced human development takes place. This will lead to description and evaluation of group behavior, social and cultural norms, women's entitlements, organization of reproductive activities, as well as cultural models and social identities.

Once some targets of development are identified gender evaluation of public policies is simply performed by: (1) determining the distance between these values and current values of selected indicators and/or indices, and (2) determining the effect of policy intervention by improving the Level 1-indicators. Our GA process is completed with a usual feed-back loop on developmental targets.

3. The local politics of well-being.

Well-being, as we have seen, refers to a physical, intellectual, and relational experience of human beings who live together in a given place (however delimited). It has also a political dimension as it is related to the distribution of public and private resources and its conception reflects the ways in which individuals, social groups and public administrations negotiate access to resources.

²⁵ On human-development as a paradigm and its different formulations, see Fukuda Parr (2003).

²⁶ On the differences on how the different approaches of human capital, human development and social reproduction take account of the human factor in the dynamic of economic system, see Ozler (1996).

²⁷ On the differences in the ways men and women express different living experiences see Gilligan (1982).

²⁸ On the dimensions of unpaid work of social reproduction and its role in the Italian economy see Picchio (Ed) (2003).

²⁹ In this regard, the special issue of *Feminist Economics* on Amartya Sen can be usefully consulted. In particular, see Roybens (2003).

³⁰ The total population is around 650.000 people.

³¹ ICESmo

³² Other official documents can be used to derive specific responsibilities towards local well-being assumed by the District. It has to be noted that the Provincial District interacts with other local governments, such as the Region and the Municipalities. Law sets the institutional division of labour and responsibilities among the different levels, although, at present, is undergoing major changes.

³³ In caring we include also the unpaid work for the maintenance and transformation of goods and commodities necessary and convenient for daily livelihood.

³⁴ This very complexity was the object of the enquiry on *man and society* that characterized the Enlightenment and is part of a lost foundation of political economy.

³⁵ In conceptual terms there is not a precise level of adequacy. Some dimensions of it can be indicated with some rigour through fuzzy logic or through various qualitative indicators that capture them and their possible changes. Adequacy is usually referable to a pragmatic social proportion indicating acceptable standards, i.e. *neither too much or too little*.

The Human-Development approach implies a change in vision and language of economic discourse and for this reason it also requires a change in the metric used for evaluating policy objectives and results³⁶. The whole language of political accountability changes if the economic focus moves from the ground of monetary income and market transactions to that of the quality of life, intended as a set of doings and beings of residents. On this ground, the local administration would be made accountable not for what it has done and spent, but for the extent to which what has been done and spent has made residents capable of doing and being in the local open social context.

The methodology here proposed for auditing the Modena Provincial Budget draws on the list of relevant capabilities that compose a state of well-being of individuals living in the Modena Provincial District listed on the basis of explicit political commitments undertaken by the provincial government. The well-being dimensions considered are thus not indicated on the basis of ideal criteria of justice and gender equity, but are rather the translation into a well-being language of the commitments effectively included in official documents and embodied in the structure of the provincial departments.

Actually, local governments have always entered into a pragmatic political relationship with residents and other local institutions on the ground of local living conditions. Nonetheless, although, in the political rhetoric the well-being of residents has always been paid lip service, it was not part of the general macro framework of public policy. Consistently with the general vision of the economic system, residents' standards of living were seen as the effect of monetary incomes. Social conditions were given analytical importance only as a problem of poverty and social exclusion, thus at the margin and not at the core. Also welfare expenditure, such as that for health and education, so important for individual and social well-being, was analysed as honourous final expenditure or as a component an effective-demand, circular only in terms of the selling of commodities, and not as necessary inputs in the formation of social-capital.

The idea perceived by residents and governments as to what must be considered adequate and acceptable is usually not the same and is generally ambiguous. Residents themselves often have different ideas of it because their perceptions reflect different access to resources, social power relationships, and, on the whole, different living experiences. The awareness of the existence of subjects positioned differently in society means that the policy impact must be assessed taking into account also *the colour of money* i.e. of the different needs, power relationships and perceptions of residents belonging to different social groups. In the case of gender auditing the colour is traditionally pink but the shade of pink depends on the gender perspective adopted. In this regard, a particular methodology is here used in designing a possible auditing of the Modena provincial budget that could take into explicit account the fact that historically women's' experience and perceptions of well-being are considerably different from men's. This is a difference rooted in a daily process of *making* lives that normally requires dealing with the maintenance of bodies, identities,

³⁶ On human-development as a paradigm and its different formulations, see Fukuda Parr (2003).

domestic spaces, personal and social relations. The answers to the question "how to live?" are gendered because there are relevant gender differences in the way the question is posed and in the answers given to the questions *what to do, what for and for whom?*³⁷

Women, historically, have been given the final responsibility for the quality of life of the family members, adult men included. The visibility of women's work of social reproduction and its contribution to the quality of life allows for an extension of the well-being perspective to reach the gender division of labour and responsibility in the household³⁸. This extension changes the whole idea of gender equality and poses the question not only in terms of women's disadvantage in social bargaining but, rather, in terms of the hidden fragility of the dominant subjects, usually absorbed through an enormous amount of housework and caring. It is, in fact, the responsibility of coping with the vulnerability of others (adult males included) that pushes women to the margin of social negotiations and makes them victims of much domestic and social violence.

Well-being is a women-friendly analytical perspective, not only because the authors who work in this approach, starting from Amartya Sen, are usually feminists ready to recognise women's inequality as a problem of human rights and justice, but also because feminist theorists can play a major role in contributing to the whole perspective, disclosing ambiguities and hidden aspects³⁹. The shift of focus accomplished in the capabilities approach, from monetary income and utilitarian welfare to well-being, and the adoption of a metric of human development, opens a space for a gender perspective focussed directly on living conditions. This perspective is capable of taking into explicit account women's experience of the costs and fragility of the process of forming capabilities and sustaining effective functionings. What is more important, a well-being perspective allows one to see the sharing of reproductive responsibilities as a social and political issue and not merely as an intimate aspect of a personal relationship (Picchio, 1996). In this way the distribution of responsibilities towards the quality of life ultimately becomes also a problem of social and political negotiations partly overcoming the traditional dichotomy between the *oikos* and the *polis*.

An analytical focus on the social reproduction of capabilities and functionings of individuals extends the vision of the economic system taking account, in the same picture, of reproductive non-market activities, state and firms, both profit and non-profit ones. (Budlender, 1996; Picchio, 2003).

3.1 Modena Provincial District

The Modena Provincial District includes several municipalities, of different sizes and productive structures, some of them internationally famous

³⁷ On the differences in the ways men and women express different living experiences see Gilligan (1982).

³⁸ On the dimensions of unpaid work of social reproduction and its role in the Italian economy see Picchio (Ed., 2003).

³⁹ In this regard, the special issue of *Feminist Economics* on Amartya Sen can be usefully consulted. In particular, see Roybens (2003).

for their very dynamic industrial districts (Brusco, 1989). The Province has a total population of and Modena itself ranks among the very first cities in Italy for per-capita income with a distribution of income relatively more egalitarian than the rest of the Country (ICESmo, 2003) . The district has a strong democratic tradition, high women's activity rates (66%) and public services for children that are internationally known for their excellent quality and good coverage. These brief notes serve only to show that the social context is opulent and progressive and has a tradition of women's agency, partly rooted in their active role in the antifascist resistance movement and in the feminist movement. In spite of all these achievements, major gender inequalities are still persistent in terms of incomes, total work (paid and unpaid), political representation and poverty (Osservatorio Mercato del Lavoro, 1997)

The provincial government is structured in Departments led by *deputies* (*assessori*) who are nominated by the District President who is elected by the resident citizens. The Departments' expenditure is organised in *responsibility centres* (*centri di responsabilità*) formed by administrators who design programs and supervise public spending in specific projects. The budget to finance projects and programs is presented in the Yearly Forecast Report of the Provincial Board (Amministrazione Provinciale, 2003). There are several other documents in which the costs of specific projects are reported and the official commitments are indicated⁴⁰. A very important document is the Piano Esecutivo di Gestione (PEG) that has detail information on effective expenditure and financial sources.

The way to proceed in order to arrive to a budget that uses well-being as a general perspective and as metric for assessment is to go by pragmatic tentative steps. In this paper we only present a first step, i.e. the translation of the institutional functions of the Provincial District into a capabilities list introduced in the matrix of table 4. The next step would require a clear specification of the institutional responsibilities and aims of the Provincial District with regard to other local governments (Region and Municipality), followed by an indication of the major lines of expenditure, their structure and relevance for the well-being of residents. Monetary values will be used only at the end to assess relative weights keeping in mind a metric referred to wellbeing in terms of adequacy of resources to commitments and objectives. In the end well-being leads to a list of commodities and services necessary to obtain the result, at this stage physical and monetary accounts become fundamental and subservient to a well-being policy.

The matrix of table 4 is constructed by relating the existing nine Departments (in the lines), and translating the sense of their institutional functions and policies into a list of capabilities (in the columns).⁴¹ The symbolic impact of this double-entry table is to put the administration in direct relation

⁴⁰ It has to be noted that the Provincial District interacts with other local governments, such as the Region and the Municipalities. Law sets the institutional division of labour and responsibilities among the different levels that, at present, is undergoing major legislative changes.

⁴¹ The matrix of table 4, in its first format, was discussed and constructed with the graduate student Ylenia Rovinalti in the context of the Report for the "Feasibility project for a Gender Auditing of Public Budgets".

with residents' living conditions. Doings, beings and feelings listed represent the dimensions of well-being explicitly assumed as political responsibility by the local government in order to enable male and female residents to function. In the end, functionings belong to the sphere of individual agency although embedded in a social context and situated in a place institutionally defined. The matrix is extended to include the usually hidden capability of caring that plays a life-long basic role in human well-being⁴².

Caring for oneself and others is a hidden contribution to the economy but it is also a capability in itself that requires resources and time to be formed and sustained. It is usually treated as natural, thus free, or as a residual, thus as marginal, whereas to care for people requires time, self-confidence, adequate space, resources, if it is not to be degraded, into self-destruction and/or cynicism. In Modena, at the level of local policy, the problem of caring is faced only partly in terms of organization of life and working times, as we shall see in the next session.

The process of forming each capability requires different contributions, co-operation and sharing of responsibilities among the different departments as capabilities themselves are a multidimensional concept that require a variety of inputs.⁴³ For instance, a person's education needs teaching, buildings, roads, transports, healthy food, equality of opportunities, culture, sport, resources and subsidies, information, etc. Moreover, the capability of being and feeling secure depend from the safety of buildings, roads, food, environment, access to resources, caring, social recognition, body integrity, property safety, et.

All the Departments involved in the necessary provisions to form and sustain the different capabilities need to be aware that their function, beside their specific contribution, is to co-operate in the common effort of providing for a conventional state of well-being. The coordination of the Departments for a shared multidimensional purpose impacts on the administrative organisation itself that needs to be able to self-reflect on its aims and adjust its machinery to co-ordinate internally and with other local, national and international institutions (Dept. n. 9). The relative weights of the interdepartmental links depend from effective projects and actions that need to be assessed in terms of their impact on specific individual functionings and capabilities. A Department is a too broad category to work on, but, in the end, it is the center of political responsibilities.

In the following matrix we could see capabilities as the outputs and the Departments activities as the inputs. As we can see intuitively the possible links are very extended and can cover the whole matrix. They just need to be worked out in specific policies, as is partly done in the next section.

⁴² In caring we include also the unpaid work for the maintenance and transformation of goods and commodities necessary and convenient for daily livelihood.

⁴³ To be educated means both to know and to relate to others, to sit at a desk and to move, et.

| Capabilities > | Being educated and trained | Living in healthy, secure places | Moving in the territory | Feeling secure | Having access to resources | Living a healthy life | Caring | Having leisure enjoy beauty | Being informed |
|---|----------------------------|----------------------------------|-------------------------|----------------|----------------------------|-----------------------|--------|-----------------------------|----------------|
| Departments V | | | | | | | | | |
| 1. Education and Training | X | X | X | X | X | X | X | X | X |
| 2. Environment & Civil protection | X | X | X | X | X | X | X | X | X |
| 3. Roads, Transport and Buildings | X | X | X | X | X | X | X | X | X |
| 4. Food and Agriculture | X | X | X | X | X | X | X | X | X |
| 5. Economic policy, human resources & equal opportunities | X | X | X | X | X | X | X | X | X |
| 6. Tourism, Culture and Sport | X | X | X | X | X | X | X | X | X |
| 7. Urban & territorial planning | X | X | X | X | X | X | X | X | X |
| 8. Labour, Welfare, Non-profit Sector and Migrants | X | X | X | X | X | X | X | X | X |
| 9. Budget, administration, EU, Institutional affairs | X | | | | X | | | | X |

Table 4 A Well-being approach to the Modena Provincial Budget

It is important to notice that departments contribute, in different ways and with different degrees of responsibility, to several dimensions of well-being. This means that the service provided by each department expands into several capabilities. For instance, the Department of Education and Training has its own specific function in providing training and education to residents but also impacts on the other capabilities, such as being able to move, to live a healthy

life, to care, to enjoy beauty and have access to resources and information, etc. The problem is not merely one of administrative organisation but it is inherent in the complexity and interaction of different human dimensions that are not separable in a state of well-being. Young students learn better if they have nice schools, are healthy, cared for, have leisure, enjoy good music and movies, because their body, mind and emotions cannot be separated in the process of learning⁴⁴. Nevertheless there is a problem of balanced proportions, and breaking points. For instance, young students need to be cared to feel secure, but not cared too much to be autonomous.

Indicators of social breaking points and unsustainable living conditions could be found in suicidal rates, young-people depressions, very low fertility rates, high long-term unemployment, domestic and community violence, et. Each capability has its own breaking points that may impact on the sustainability of individual and social well-being as a multidimensional set. Needless to say that balanced proportions and breaking points are not easy to be identified, as they are not mechanically determined. Their indication requires a conventional and shared methodology capable of taking into proper account the nature and the quality of the social reproductive process, at individual and collective level.⁴⁵

While well-being constitutes the sense of public expenditure, money represents a possible weight. In a well-being approach to public budgets, though, money has a colour that reflects the different social subjects that form the local society of residents. As we have seen in the case of women, the assumption of a neutrality of money is a major source of ambiguities. There are many colours of money, according to groups inequalities with regard to their power relationships with the state and market agents, especially employers in the labour market. To have some idea of the colour of public money, both spent and raised with taxes and tariffs, it is necessary to gather disaggregated information on the policy impact on different social groups. Impacts, though, have to be weighted with a well-being metric that is assessed in terms of well-being objectives. The capabilities of living in a decent house, enjoying a healthy life also in old age, having access to employment and political representation, not only have not the same resources allocated among different genders and groups, but, also, their very meaning can be different in terms of material content and recognition of individual and social dignity. To this regard, a gender auditing, using an extended, reproductive capability approach, can be fruitfully mixed with other social colours, to disclose, for instance, also discriminatory conceptions of the well-being of male and female migrant residents.

In this section we have only sketched, in a preliminary way, the methodology we intend to use to indicate the sense and the colour of public money. Then the auditing exercise must, ultimately, reach the crucial state of assessing the weight of money expressed not only in relative terms but mostly in terms of its adequacy to acquire goods and services in relation to the

⁴⁴ This very complexity was the object of the enquiry on *man and society* that characterized the Enlightenment and is part of a lost foundation of political economy.

⁴⁵ This means that in the analysis of the complex and interactive relation between the individual and society, the question of the effective process of social reproduction need to be faced explicitly, starting from the necessary contribution of mutual caring.

objectives and the political responsibilities assumed⁴⁶. This final phase is both technical and political. Well-being, as we have seen, is referred to residents and only a bottom-up auditing can provide a social space where different concepts and perceptions of well-being can be confronted in all their colours. In this space human development could become a common language needed beside all also for expressing tensions, and this provision of a political space and language could be a very important result of a well-being approach to public budgets auditing.

Finally, a women' perspective, based on an extended reproductive well-being approach, could lead to important changes with regard to the vision of the link between social welfare and economic development. On the one hand, major inequalities can be disclosed assessing the different policy impact, on women and, more generally, on the quality of life of different (gendered) social groups. On the other hand, using women's wide experience of individual and social vulnerability, new visions of the individual and of economic development could emerge. The quality of life is based in the places where bodies are located and minds and relations are situated. This means that a politics of well being is strictly linked to a politics of place whereby the definition of place and its boundaries are open to individual and social historical experience.⁴⁷ But, what is more important, a politics of well-being could disclose the historical fact that the sense of profit economic activities, can be deeply in tension with the well-being of the population in organising the provision, distribution and exchange of resources. In this respect, the auditing of public budgets in a well-being approach could become a fruitful exercise of self-reflection but also a tool for efficient spending and collecting money. Well-being is a social practice and a well-being oriented budget is an exercise that has to be done with the co-operation of residents, administrators, political representatives, and local institutions. In the case of the Modena Provincial District, the development aspects become particularly challenging. We are in a rich industrial area whose history can be used to search for new perspectives capable of disclosing on the one hand the role of local well-being as social capital, on the other to discover new notions of capital as necessary social consumption to enable residents to live a good life. In order to define what is necessary we have to indicate possible breaking points; i.e. to disclose what happens if some capabilities are not formed and some standards of adequacy are not met. The definition of what is necessary depends from whose perspective. In the case of a proper women's perspective it means that we need to find appropriate indicators to be added to the equal-opportunity ones on which the second section of this paper focused. The new indicators need to take into account total work, adequacy of incomes and public services, human rights to decent well-being standards for all, inspite of their differences. In a reproductive well-being perspective some aspects of the economy, usually hidden and/or marginalised, can be shown to have an important effect on the provision of resources and on its dynamics.

⁴⁶ In conceptual terms there is not a precise level of adequacy. Some dimensions of it can be indicated with some rigour through fuzzy logic or through various qualitative indicators that capture them and their possible changes. Adequacy is usually referable to a pragmatic social proportion indicating acceptable standards, i.e. *neither too much or too little*.

⁴⁷ The notion of politics of place is taken from Escobar and Harcourt (1998).

The Modena local level could allow for a fruitful exercise of reflection on the economy based on co-operative networking, democratic bottom-up auditing, women's agency, opening a space for a less reductive overview of economic and social connections and a more realistic and less distorted evaluation of policy impact. It is a difficult and long way to go, but is worth to try.

4 Experimenting the capability approach at municipality level: the case of the City of Modena

After applying the capability approach at regional and district level, the aim of this last section is to experiment its application on the budgets and policies of Modena municipality by trying to disentangle the contribution of the municipality to the standard of living of this town. This exercise has been carried out by using different tools (analyses of budgets and reports accompanying them), analysis of data collected at local level and interviews.

4.1 The capability approach shows how the extended standard of living arises from a network of institutions and individuals at the local level

The application of the capability approach to the local level chosen showed that the Municipality acts in a network that we try to describe in Figure 1.

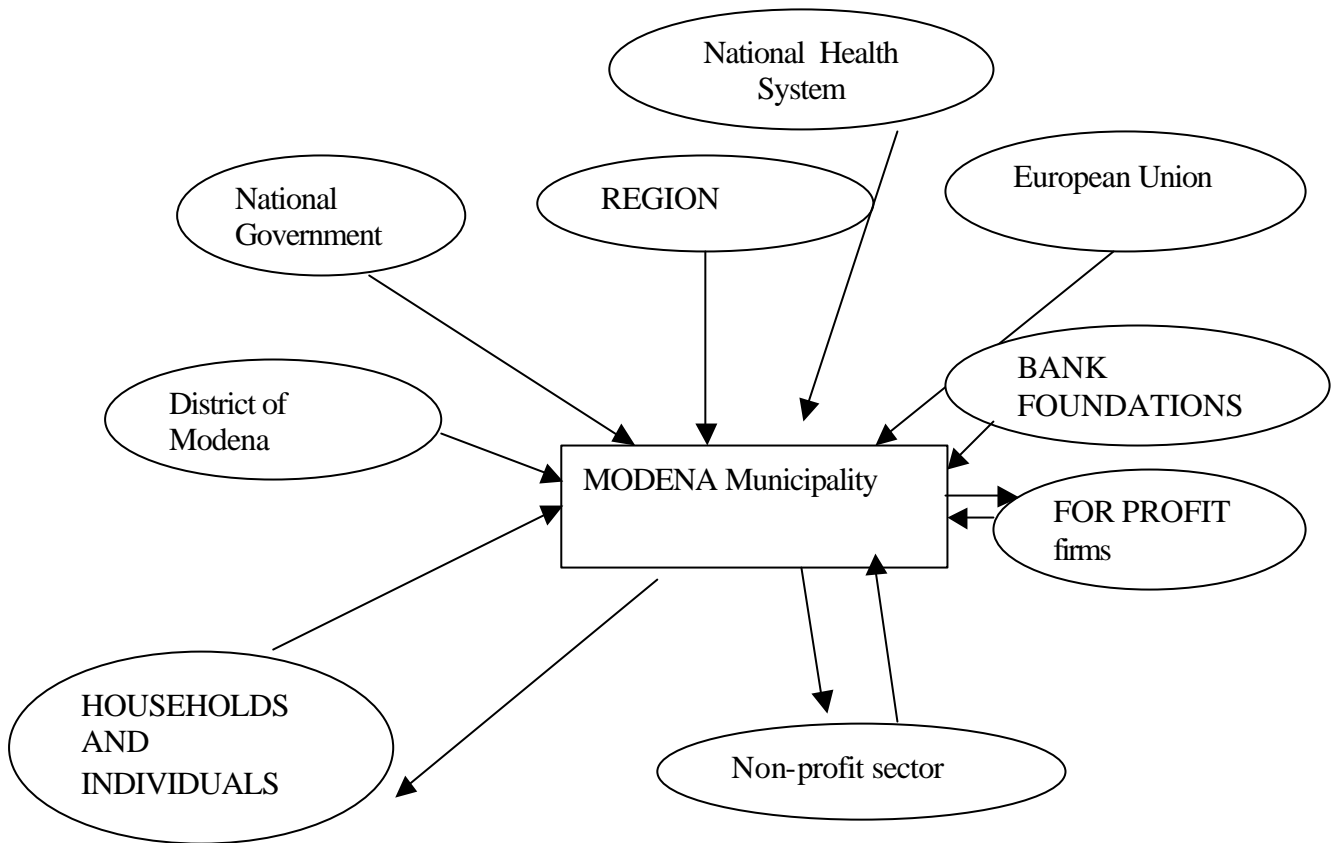


Fig.1 - Municipality and the extended macroeconomic flow

The municipality collects money from the individual town residents in the form of taxes and fees (the latter in payment of the services directly provided by the municipality) and from other public and private institutions. These funds allow the supply of services that directly contribute to the residents' well-being. The analysis of Modena Municipality reports (such as *Rapporto di Attività, Comune di Modena 2002a* and *Piano di Zona, Comune di Modena 2002b*) shows how the local government promotes and participates in an institutional network together with other local actors. The tools used to establish this network are both formalized (e.g. councils, concerted boards, partnership on specific projects, managing committees) or arise as informal relationships with other institutions and with individuals in the provision of public services.⁴⁸ A participative approach to planning is explicitly perceived in different reports of the local administration (i.e. *Comune di Modena 2001b*). In this document one can also find a response to the gender approach to the quality of life negotiated with the Municipality by the 'Women's Convention'. The latter is a group of women with different professional positions and political affiliations, that in 1998 proposed an agreement with the candidates for election for the town mayoralty. Since 1999, this group has

⁴⁸ These relationships arise, for instance, in the provision of services by the *Centro per le famiglie* of Modena municipality as the analysis carried out by Vando Borghi (in Addabbo *et al.* 2003) shows.

maintained a stable relationship with the local government to promote women's participation in political life and to control the quality of life in a gender perspective.

The network of different institutions acting at municipal level for the improvement of living conditions is also represented in the *Piano di Zona*, a report which for each welfare project enables identification of the users (actual and potential), the institution/s involved in the provision, the tools used for the provision, the fiscal budget, the number of employees (and the type of labour contracts), and possible problems, as well as indexes to evaluate the policy impact. This document also allows us to see how the institutional network operates with regard to services that have a direct impact on local women's well-being. For instance, one can refer to the service provided by the Social Department of Modena Municipality in cooperation with non-profit organizations such as the *Gruppo Donne e Giustizia* and *Casa delle Donne contro la violenza* to prevent violence against women inside the household and help them in case of offence. This service clearly impacts on the very definition and effective implementation of their capability of living in a safe space and exercising control over their own body and health⁴⁹.

4.2 Capabilities, Empowerment Dimensions and the Municipality Functions

Consistently with the approaches defined in the previous parts of this paper, we tried to see how the functions of the Municipality can contribute to the building of a certain extended standard of living by developing specific capabilities. The local government is nearer to the definition of the local standard of living than the other institutions acting at a local level, and this becomes quite clear if we try to analyse the general functions assigned to the municipality⁵⁰ in the light of the empowerment dimensions identified in Section 2.1.

⁴⁹ Expenditures in this regard amounted to 147.324,08€ out of an expenditure total of 221.722.177 in the 2001 budget.

⁵⁰ See Anessi Pessina (2000) and Vandelli (2000) for definitions of local government functions.

| Empowerment Dimensions | Municipality Functions |
|--|---|
| Access and control over public and private resources | Social and Welfare Sector |
| Control over one's body and identity | Social and Welfare Sector (prevention and rehabilitation services) |
| Control over one's work and other projects | Economic Development Sector - Culture and performing arts |
| Access to political and governance space | Equal opportunity expenditures |
| Control over one's mobility and safety | Municipal Service, mobility and transport |
| Control over one's time and recreation | Social and Welfare Sector (services to children, the elderly, etc.) |
| | Culture and performing arts |
| | Sport |
| Access and control over intangible resources | Public education, Culture and performing arts |

Tab.5 - Municipality Functions and Empowerment Dimensions

Furthermore, one can read the expenditure side of the Budget of Modena municipality by connecting each centre of expenditure with a specific capability as we propose in Table 5; note that the same centre of expenditure may contribute to the development of more than one capability consistently with what has been analysed for the district level in Section 3. The list of capabilities here endorsed has been constructed pragmatically by crossing the capabilities relevant to defining an extended standard of living at local level with the functions and sectors derived from auditing municipal budgets.⁵¹ Consistently with Robeyn's (2003), interpretation of Sen's approach, however, we would advise that the local government should undertake together with the other institutions and associations acting at local level a process leading to the definition of a list of capabilities to endorse and to confront with in allocating funds and in the design of public policies. At local level one can use the available data to evaluate the achievement in well-being in a gender perspective and ask for more data to be collected to make the list effective.⁵² For instance, one can use household data like *ICESmo* (a survey on the socio-economic conditions of households living in Modena carried out in 2002 by CAPP-Centro di Analisi delle Politiche pubbliche which is significant at

⁵¹ On the different levels of generality that can be followed in drawing a list of capabilities see Robeyns (2003).

⁵² Gender auditing often reveals a lack of data dis-aggregated by gender which are crucial in analysing the gender impact of policies (Elson, 1998; Sharp, 2000); on the necessity of collecting better data concerning the capabilities to be inserted in the list see Robeyns (2003).

provincial and municipal level) to indicate gender differences in the distribution of time and responsibilities in the process of social reproduction that lead to differences in the acquisition and maintenance of different capabilities. In this regard the importance of the capability of caring for oneself and others must be stressed, together with the different dimensions of empowerment related to the control over one's time and the capability of accessing resources and social initiatives and facilities. The data on attendance by gender of libraries, performing arts and museums and other relevant individual quantitative and qualitative information may be used to assess the relevant differences in the access to public or private (often publicly funded) services which impact on the capabilities of enjoying leisure and recreation as well as aesthetic perception.

| Functionings | Types of expenditures |
|--|--|
| <i>Be trained and educated</i> | <ul style="list-style-type: none"> ▪ Public Education ▪ Culture and policies towards young people |
| <i>Live in adequate healthy and safe spaces,</i> | <ul style="list-style-type: none"> ▪ Urban planning, environment, urban building ▪ Public constructions and urban structures ▪ Planning and environmental services, ▪ Development and economic services ▪ Housing |
| <i>Physical mobility</i> | <ul style="list-style-type: none"> ▪ Urban planning, transport, mobility |
| <i>Feel safe</i> | <ul style="list-style-type: none"> ▪ Municipal Police Service, Economic Development Department |
| <i>Live an healthy life</i> | <ul style="list-style-type: none"> ▪ Health and social services, pharmacy, sport |
| <i>Capability of caring (for oneself and others)</i> | <ul style="list-style-type: none"> ▪ Education, health and social services |
| <i>Recreation and leisure</i> | <ul style="list-style-type: none"> ▪ Culture, youth-oriented policies, sport, ▪ Development and economic services |
| <i>Aesthetic perception</i> | <ul style="list-style-type: none"> ▪ Culture, youth-oriented policies, environment |

Tab.6 - Modena Municipality types of expenditure and functioning

We will now proceed by describing the role of the local government in sustaining the capability of caring for oneself and others which is crucial for a well-being seen in a gender perspective. In particular, our main focus is on the capability of caring for children under age 3. The empirical evidence shows how the largest part of caring for children especially in this age group is provided by their mothers, and recent data on Modena Municipality confirm that even if men tend to participate more in unpaid work in Modena Municipality than in Italy in general,⁵³ women are the main providers of caring

⁵³ Addabbo and Picchio (2003), using ICESmo data on the socio-economic condition of households living in Modena collected by Capp.

and other domestic activities inside the family.⁵⁴ Moreover, it must be recalled that the function of caring has a major impact on women's activity rates as the presence of young children discourages women's labour supply whereas it has no significant impact on men's labour supply⁵⁵. With regard to female activity rates Modena women's employment rate in the year 2000 was 60% as against 39.6% at national level.⁵⁶ This high score can partly be explained with a higher rate of services to children aged 0-3 which reduces the fixed costs faced by women who wish to be employed.

In assessing the impact of local government policy on caring as an individual capability, the first question to answer is how the municipality can contribute to its development and maintenance. In this regard we have found that the local government does play an important role both directly (by providing child-care services) and indirectly (by encouraging the provision of services by private firms or by devising particular policies to help children and parents).

As far as public provision is concerned one should notice that Modena belongs to a region where the percentage of public childcare places provided by the local government on the population of children living in the area in this age group is the highest in Italy (we recall that the percentage of children younger than 3 attending kindergarten in Italy is on average 6% ranging from 1% in Campania and Calabria to more than 20% in Emilia Romagna).⁵⁷ In Modena in 1998-1999 the percentage of children under 3 years old in public municipal kindergartens was 22%, and the percentage of children in private kindergartens which must respect standards established by the local government (on the ratio of teachers/students, on the education programmes, types of furnishing, etc.) under an agreement established with the Municipality was 4%.⁵⁸ Moreover consistently with the policies promoted at regional level, the Municipality of Modena has devised new types of services in collaboration with profit and non-profit organizations (playgrounds, meeting places, etc.).⁵⁹ These services are provided by the Department of Public Education, the expenditures devoted to this item amount to around 21% of the total expenditure of this Sector of Modena municipality in the period 1998 - 2001.⁶⁰

The provision of child-care services in Modena can also be used to understand how the flows described in Figure 1 in Section 4.1 may operate with regard to a special capability. We can observe transfers from the Region

⁵⁴ On the unequal distribution of time inside Italian couples with regard to total work and the macroeconomic consequences of this see Picchio (2003).

⁵⁵ See Addabbo (1999) for analyses of Italian data showing how the behaviour of labour supply for men and women differs by the presence of children in different age groups and by areas in Italy.

⁵⁶ Comune di Modena (2000).

⁵⁷ One should also notice that the region is characterised by a higher percentage of working mothers than the Italian average and by a higher demand for public services by families with children under 3.

⁵⁸ Comune di Modena (1999).

⁵⁹ On the diffusion of this type of services see Marchesi *et al.* (1998) and Ecchia *et al.* (2001).

⁶⁰ For a more detailed analysis of the expenditure on this service see Addabbo *et al.* (2003).

Emilia Romagna to the Municipality targeted on the provision of child-care services, but also transfers coming from other city institutions.⁶¹ The Municipality provides the service to the families who pay fees according to means testing, the fees collected covering only part of the cost of the service provided. By supplying this service the municipality also promotes parent participation and social inclusion of otherwise isolated families.⁶² Other private (profit and non-profit) institutions that provide child-care services act under an agreement with the Municipality and must comply with criteria fixed by the municipality with regard to the quality of the service.

Another question which must be answered is: (consistently with the approach presented for the District level in Section 3) 'What are the departments in the local government involved in the development of men's and women's capability of caring?'. Analysis of local budgets and reports on the policies devised shows that the departments of the municipality involved are:

- ✓ Public education that by directly providing the services or by interacting with other institutions may affect individual caring.
- ✓ Social and health services: this department deals with the expenditures and services of the Centre for families and a policy '*assegno di genitorialità*' that provides (if means testing is satisfied) a subsidy to families. The subsidy is given when both parents are in the labour force and one of them interrupts his/her employment to care for an under-1-year-old child who does not attend public kindergarten.

The positive effect of Centro per le famiglie in helping individuals in the family to provide caring has been documented in Addabbo et al. (2003) and derives from the very aims of the Service.

As far as the latter policy is concerned, on the one hand, the possibility of leaving employment to take care of an infant child may discourage mother's return to employment; on the other hand, it may allow the development of a capability for caring by the parent involved. A simulation exercise has been performed, taking into account the likely impact of the policy on the extended standard of living (which includes also unpaid work) on the families eligible for this subsidy.⁶³ The simulation has shown that families satisfying the entitlement criteria are more likely to be double earners with wife employee (mainly blue-collar) having a low educational level and, if one considers the likely effect on extended income, mothers are more likely to take the leave and use the subsidy. Given these results, according to the literature on labour supply (Addabbo, 1999, Bettio and Villa, 1999) that shows that women with lower education level tend to stay out of the labour force after interruptions, the risk of discouraging women's labour supply is

⁶¹ We refer to the flows from Fondazione Cassa di Risparmio di Modena to the municipality for the construction of a kindergarten (www.cedoc.mo.it/fondazione-crmo).

⁶² Comune di Modena (2002b) Piano di Zona, p.52.

⁶³ See Addabbo and Olivier (2001) for a presentation of the simulation whose results are summarised in this section.

therefore confirmed. This discouragement effect (especially if one takes into account the relatively low level of income of the family) may expose the household to a higher risk of poverty spells, and, as noted by Robeyns (2003):

even if household income were shared completely, it is problematic to assume that it is irrelevant for a person's well-being whether she earned this money herself, or whether it was earned by her partner (Roybens, 2003).

Therefore a similar policy design, given the difference in the allocation of total working time (paid and unpaid) inside the family and the existing wage differentials, has the net effect of reducing the probability that the child will enter a public service (especially if the mother decides to stay out of the labour market, given the existing criteria that make it easier for double-earner families to have access for their children to the public kindergarten)⁶⁴ and therefore reduces the probability that parents may benefit from social inclusion and educational services that, in Modena, as empirical analyses and interviews have shown, are connected with attendance in public care services. Moreover, the simulation results show that the probability that the father will develop a capability for caring is significantly reduced. The latter result is in contrast on efficiency grounds with the aim of the policy itself, at least as stated in its title (parental subsidy). Furthermore, given the present welfare system, the very limited access to parental leave for atypical workers and the general labour market situation, one can state that atypical workers are more likely to be excluded owing to the difficulty in re-entering the labour market after interruption. Thus the possibility of affecting caring as a capability is reduced for parents employed as atypical workers.

Gender analysis of the impact of parental subsidy on the capability of care has shown the importance of taking into account the difference in labour supply and unpaid work provision by gender to carry out policy evaluation. If one wished to avoid the perverse effects which may arise one should design the policy to avoid them and also monitor the family afterwards to see whether children who stay at home during their first year have the same chance of being included afterwards in public services and how the work interruption affects mother's career and employment probabilities over the life cycle. A preferable policy design in terms of encouraging fathers to take the leave might be a subsidy proportional to parents' individual income in families who are entitled to it or a subsidy to be paid to part-time worker parents in connection with the supply of part-time child care services.

An empowerment dimension that is particularly relevant in the area analysed (where double-earner families are more present than on average in Italy and where total working time is appreciably high) is the dimension of *control over one's time and work*. Again, the question is what kinds of policies have been implemented by the municipal government in Modena with

⁶⁴ For the criteria used by Modena municipality to access public kindergarten and its impact on women's labour supply see Addabbo and Olivier (2001).

respect to this empowerment dimension? How much money is budgeted for this aim? A programme which can directly be connected to this empowerment dimension is 'Tempi e orari della città' (programme 3.10 in the *Rapporto di Attività del Comune di Modena, Comune di Modena 2002a*) aiming at acquiring knowledge on the allocation of time by individuals in Modena and to devise a Time Regulating Plan for the Town. Under this dimension can also be considered services apparently not dedicated but indirectly affecting the 'control over one's time and work' like the expenditure on child care, disabled and elderly services (residence and care at home) insofar as they will lighten the time constraints that are mainly binding on women.⁶⁵ The role of the Public service is important also in listening to new demands and problems arising from potential or actual users in order to devise new types of services to satisfy an increasing and differentiated demand and to help in conciliating working and life time.⁶⁶ Given the allocation of time and the existing wage differentials, a decrease in expenditure devoted to these services is bound to increase the use of private (paid and unpaid) services and to make it difficult for individuals (mainly women) inside the household to make their different uses of time compatible.

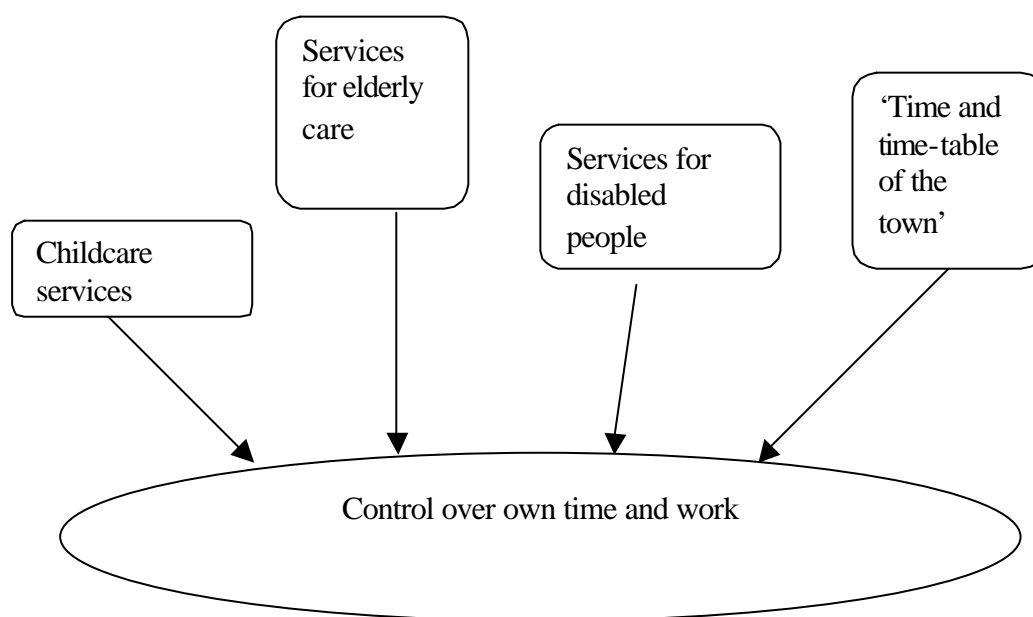


Fig.2 - Services supplied by Modena municipality on the empowerment dimension of control of one's time and work.

⁶⁵ The different weight of the time constraints and the higher time stress for wives than for husbands in double-earner families (a type of family that is more widespread in Modena than the average in Italy) has been underlined by Robeyns (2003).

⁶⁶ See for instance kindergartens open 12 hours a day which help users to model the use of the service better with respect to their working time (always respecting the educational and pedagogical criteria).

5. Concluding Remarks

In this essay we have shown how a Gender Auditing Model in a Capability Approach can be built and applied to different government levels. Starting from the definition of a list of core human values and relevant functionings, we first propose some analytical tools for governments committed to gender equity goals. As recently stressed by Robeyns (2003), the Capability Approach is ethically centred on individuals as well as not-ontologically individualistic since it assigns an important role to social and institutional conditions of conversion of capabilities into higher quality of life. This involves an open and participative process of definition of well-being based on the awareness of the complexity of the process of forming capabilities to allow for basic functionings. In this process local administrations, households, non-profit associations, and firms must interact. Public policy and social participation needs a new metric. In this connection, well-being matrixes and gender-sensitive well-being indicators are needed but they can be developed only in a process of social participation whereby different perceptions and ideas of well-being are confronted.

As has been argued above, by taking into account women's unpaid social reproductive work, harmonization of living and working times, adequacy of standards and different power relationships in the access to resources, it may be possible to provide a less ambiguous account of the gender-equity effects of public policies and to reach a greater awareness of the real conditions of sustainability of individual lives and of the system's dynamic structure. Only in this way can a gender-auditing process, avoiding a false gender neutrality of public policies and recognizing social and individual diversities, become an instrument for effective equity, sustainability and progressive human development.

The application of the capability approach has also highlighted how different institutions together with private (profit and non profit firms) and individuals interact with local government for the production and maintenance of the extended standard of living. By focusing especially on the capability of caring we have seen how the network of local institutions may operate to develop it and the services directly or indirectly provided by the local government that may affect this capability.

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