

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. Gender Equity does 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 three levels: the Region and Modena Municipality and Provincial District. Different experimental tools have been designed and used. In particular, at the regional level, individual well-being is defined in terms of an extension 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 the 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 taken 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 focuses on women's inequality but also introduces a new concept of social sustainability. Women's experience of the vulnerability of family members, included adult males, allows to disclose some general features of the economic system. Finally, at municipality level, the focus is on the network of institutions that cooperate to guarantee local well-being and particular attention is given to the capability of caring.

1. 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 focussed on three crucial ideas: (1) inter-generational equity (i.e. meeting present generations' 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

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

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,).

The last definition of SD is crucially linked with the notion of sustainable human development recently used by Anand and Sen (2000) 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).

A new characterization of the idea of SD does emerge. Firstly, it needs to address the issue of 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 higher 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 greater vulnerability throughout the

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

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.

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 analysing 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, while gender inequalities may be seen as multiple dis-functionings in a social space where genders are disadvantaged in terms of access to resources, education, health, political representation, control over their bodies and lives and so on. In this essay, a framework for gender auditing in a Capability Approach is presented with respect to three different institutional levels in Emilia Romagna (Italy): the Regional Government, the Modena Provincial District and Modena Municipality. For the Region, in Section 2 we define a list of basic functionings and gender-empowerment dimensions. Thus, crossing 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.

Lastly, the so-called *feminisation 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 a discussion of different dimensions of human development in modern social sciences see Alkire (2002).

The list of capabilities used to define the dimensions that compose residents' well-being is drawn from the institutional functions of the 9 Provincial Departments. In this approach policies are seen as an assumption of functional responsibility by the local government with regard to a state of well-being, considered conventionally acceptable at local level. The Departments' functions and their programs are then translated into a well-being language that, although is already used in the political rhetoric of their documents, is not adopted as an evaluative space of the policies impact. This language is more directly understandable by residents as they are the subject of the capabilities at stake.

The well-being approach used as methodology to audit the public budgets expands the notion of standards of living into a human-development concept, and redefines also the notion of sustainability from a feminist perspective. In fact, it extends the capability approach to include the process of social reproduction of individual capabilities, taking into account also the capability of caring for people.⁷ (This extension leads to a new definition of social sustainability that includes also the reproduction of bodies, emotions and social relations and, in general, requires that material, symbolic, structural and ethical dimensions be retained in the same picture of the economic process, at macro and micro level. Women's day-by-day experience, in coping with the vulnerability of bodies and emotions of other individuals (adult men included), as part of an historical final responsibility for their quality of life, is used here in a *reproductive well-being approach* to disclose some ambiguities in the vision of human development, usually not detected in a perspective of equal opportunities.

Finally, the aim of section 4, is to experiment with the capability approach 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 work⁸.

⁷ Caring is exercised via unpaid household work, now measured by national statistics in a total that, across industrialized countries, is slightly bigger than the total men's and women's paid work, UNDP, 1995; Picchio, 1996, 2003).

⁸ 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.

2. Regional Government

2.1. Core human values and capabilities

Any assessment of public policies' effects on gender equity, and hence any gender auditing practice, requires the primary specification of an evaluative space (*metric*) for living conditions, as well as gender-equity targets of development

As is well established in the literature, human living conditions are unlikely to be realistically represented using utility or income as reference metric.¹⁰ Firstly, measuring standards of living using utilities, assumes that all human needs can be reduced to a need for utility, an assumption which is clearly not realistic. Secondly, whereas pervasive inequalities between individuals in terms of economic and social *entitlements*¹¹ exist, some agents might not be able either 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).

In defining what human living conditions represent, we use Amartya Sen's Capability Approach¹² that employees as basic notion, the concept of functioning and proposes, as evaluative space, a vector of individual capabilities to function. This approach acknowledges the fact that every human being has some valuable functionings that constitute his/her relevant dimensions of human 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). 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 to human flourishing, a less focalized set-oriented notion of well-being might be more appropriate. Respectively, in the first

¹⁰ On this fairly well-known issue see Sen (1983), (1985), (1993) or, more recently, Qizilbash (1998).

¹¹ 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.

¹² See Sen (1985), (1993), (1999). For a clear presentation of the arguments, Alkire (2002).

case, improvements in the quality of life are measured by increases in a valuable functioning, in the second case by an option-set expansion¹³.

Valuing, according to positive freedom, suggests that individual well-being be defined in terms of what Sen calls a 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 the evaluative 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, 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, the human core values and related functionings are listed¹⁴.

¹³ On this technical issue see Pattanaik and Xu (1990) and Barberà, Pattanaik and Bosset (2001).

¹⁴ This list aims to be heterogeneous, tentative and open-ended, like that of Nussbaum (2003). A further note on the problem of making lists in Sen (2004) .

| Domains | Basic Human Values | Related Functionings |
|--------------------|------------------------------------|---|
| Body | <i>Healthy Life</i> | Bodily 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

Human values and functionings can be classified in four domains. Firstly, body integrity, physical, psychological and environmental safety and having a normal life span, stand for body-related 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 individual and others in social institutions (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, as being able to hold property, having a skill-oriented employment etc., refer to necessary capabilities to

function for achieving other core values. This domain includes individual socio-economic entitlements and those capabilities referring to the satisfaction of needs for food, drink and shelter (see Nussbaum, 1995). 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 include some empowerment dimensions which may be included in gender-auditing processes.

In the next sub-sections, we introduce a multidimensional model for Gender Auditing (henceforth GA) of public policies used by a *regional representative institution* (e.g. a representative parliament, with legislative powers and macro-micro economic policies, managed by a Council with executive powers). The model takes its logical cue from human development approach, deals with multidimensional deprivation in the space of capabilities,, human core values and empowerment dimensions . 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. Moreover, if (gender) inequality is a multidimensional problem a multidimensional GA framework is needed to design and assess public policies with regard to equal entitlement and access to well-being.

2.2 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. First, we shall cross them with the main domains chosen for the auditing of gender-equity public policy .Second, 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 a 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 impact of public policies on several aspects of women's life from the 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 become a useful policy tool.

Then, we suggest a set of elementary indicators for GA. This choice is consistent with the European Union's recent approach in measuring social exclusion¹⁵. Simplicity, intuitive validity, responsiveness to effective policy interventions and practicability are some principles applied to social indicators. Generally, they aim to make indicators sets easily understandable and of practical use for policy makers. Our proposal has to be placed in this perspective.

2.2.1 The GA Matrix

As mentioned 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 loses in tractability and requires large administrative costs. At the contrary, choosing too small a set could mean losing, in GA exercises, some crucial human dimensions. Fine tuning is required. For illustrative purposes, we assume that three dimensions of women's empowerment are chosen by a regional government¹⁶

- 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 of public policy and planning, we might distinguish:

¹⁵ On this issue see Atkinson *et al.* (2002).

¹⁶ 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.

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. This matrix is presented in the following table.

| GENDER AUDITING Matrix | <i>Institutional policies</i> | <i>Macroeconomic Policies</i> | <i>Meso and micro-economic policies</i> |
|---|---|--|---|
| <i>Control over material resources</i> | <ul style="list-style-type: none"> ▪ Laws and other dispositions ▪ Social recognition 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 |
| <i>Control over non-material resources</i> | <ul style="list-style-type: none"> ▪ Laws and other dispositions ▪ Work-life balance measures | <ul style="list-style-type: none"> ▪ Educational services | <ul style="list-style-type: none"> ▪ Targeted benefits |
| <i>Participation and active citizenship</i> | <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

Looking at Table 2, it may be noticed that for some entries, like work-life balance measures, 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 means-tested conferred benefits, a more quantitative evaluation may be possible.

Expenditure for equal opportunities between men and women 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 income¹⁷. Finally, target benefits are here viewed as extensively as possible: they include monetary transfers to targeted groups, associations and actors of the so-called *civil society*, such as educational and cultural publicly financed activities, as well as transfers to unpaid workers.

2.2.2 Some Indicators for Gender Auditing

Once a GA matrix has been built, some auditing cases 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 to measure some aspects of men's and women's living conditions and to synthetically assess the gender effects of public policies.

In this subsection, we mainly present and discuss some indicators for GA. Some of them are well-known indices frequently used in human 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. Together they form a non-exhaustive and open-ended proposal.

Furthermore, in these last years we have witnessed an extensive discussion on the use of 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 should consist of a number of indicators for the main gender empowerment dimensions that have to be covered (see above)
- Level 2 should 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 we propose that 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

¹⁷ See Elson (1994), (1993).

Gender Development Index (which evaluates gender inequality in its overall assessment of aggregate well-being of a country or region)¹⁸.

- Level 3 should consist of indicators for auditing public policies from a gender-equity perspective. These indicators generally refer to aspects included in the gender auditing matrix.

This three-tiers 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 official documents and declarations of intents. In the next table, some feasible Level-1 indicators are briefly presented. As it can be seen, the list takes inspiration from the indicators framework of the UN common country assessment (UN,1999) and almost all the indicators have to be disaggregated by gender. Furthermore, they have been slightly modified to deal more adequately with opulent regions of the North of Italy (like Emilia-Romagna). Level-1 indicators provide also the informational basis for the computation of the GDI and the GEM¹⁹. Finally, Level 3 indicators are listed with respect to the gender matrix under discussion. Some of these indicators have been previously proposed by Elson (1998), some others are built following a similar methodology.

¹⁸ On these indices see UNDP (1995) and Bardhan and Klasen (1999).

¹⁹ 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. Relative and Absolute Poverty Gap Ratios 3. Income Inequality (Gini Index) 4. Short term and Long term Unemployment Rate 5. 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 High Education 3. Enrollment Ratio in Publicly Financed Specialization Courses or trainings 4. Drop-out Rates wrt 1-3 5. Ratio of Female to Male Literacy in technical topics | | |
| <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 public institutions 4. Share of official participation in NGOs, associations etc... | | |
| LEVEL 2- SYNTHETIC GENDER INDICES | <ol style="list-style-type: none"> 1. Gender Development Index (additional information about longevity is needed) 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) Interventions 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 ✓ Direct/Indirect Taxation Ratio | <ul style="list-style-type: none"> ✓ GT Income Transfers Ratio ✓ GT Expenditure for Business Support Ratio |
| A2 | <ul style="list-style-type: none"> ✓ GT Conciliation Policies | <ul style="list-style-type: none"> ✓ GT High 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) ✓ Percentage of Seats held in Political Institutions | <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 target values for relevant gender-equity indicators. Consistently with the Capability Approach, it might be necessary to

orient public policies more firmly in favour of one sex, when its absolute disadvantage, assessed in the space of capabilities, is greater. Hence, it is crucially important to describe and analyse, at local level, how and when the social transformation of public resources into a process of human development, takes place. This will lead to an analysis and evaluation of group behaviour, social and cultural norms, women's entitlements, the use of time, as well as of cultural models and social identities.

Once some targets of human development are identified (with respect to level 1 and 2), gender evaluation of public policies is simply performed by: (1) determining the distance between these and current values of selected indicators and/or indices, (2) calculating indicators for gender equity in public policies, (3) determining the effect of policy interventions by improving the Level 1-2 indicators or indices making visible the distances from target and actual annual rate of progress. Finally, our GA process is completed with a usual feed-back loop on developmental targets.

3. The local politics of well-being: the Modena Provincial District

At the provincial level, the list of capabilities used to define a multidimensional well-being space, is derived from the capabilities implicit and embodied in the administrative structure itself. The functions of the Provincial District are taken as reflexes of the political responsibilities historically assumed by of the local government with regard to specific aspects of residents' well-being. Moreover, the methodology used for the Modena Provincial District is an *extended reproductive well-being approach* that not only focuses on gender inequalities, but also introduces a new concept of social sustainability. In fact, women's experience of the vulnerability of family members, included adult males, allows to disclose some general features of the economic system that can be made visible when the process of social reproduction of the population is disclosed. This particular focus on the process of social reproduction of individuals and their capabilities, on the one hand, allows to take into explicit consideration domestic work and caring for others and one's self, on the other hand, makes it possible to work on some vulnerable points of the social structure that emerge also in an opulent territory such as Modena.

With regard to local public budgets, the capability approach introduces a shift of perspective from means to ends. As it happens for the human-development approach with regard to income. Monetary expenditure and revenue are means and residents' well-being is the end of policy. This shift of

perspective leads to a change of language, from a technical financial one, difficult to understand even for the administrators themselves, to a common language able of expressing residents' quality of life. Residents have the experience of making lists and of thinking in terms of their capabilities of doing and being. When they meet each other, for instance, they ask themselves, "how are you? Or what do you do?" not "what did you buy", at least not yet. They also have the experience of negotiating with the local government on the quality of life and public services: i.e., on their mobility, education, safety, et..

A multidimensional well-being approach provides an interconnected evaluative space that shows that each Department contributes to several capabilities, and also that each capability, included in the list, is multidimensional and sustained by the action of different Departments. For instance, the capability to be and feel secure depends from health services, transports, buildings, regulations, police, etc. If we build a capabilities/policies matrix, to assess the gender impact of policies in a capabilities space, we see that interdependences among different Departments are systematic and they need to be worked out in terms of effective links and gradations of relative weights. The administrative interdependence on the common objective of resident's well-being thus, shows, at organizational level, a strong need for cooperation and interdepartmental networking to meet well-being commitments.

Well-being, as we have seen, refers to a physical, intellectual, and relational experience of human beings situated in a given place. 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.

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 objectives and results²⁰. 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 only for what it has done and spent, but for the extent to which what has been done and spent has made residents capable of functioning in a 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 province on the basis of explicit

²⁰ On human-development as a paradigm and its different formulations, see Fukuda Parr (2003).

political commitments undertaken by the Provincial District. 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 is not part of the general macro and meso framework of public policy. Consistently with the general vision of the economic system, residents' standards of living are seen as the effect of incomes and final monetary consumption. Living conditions are 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, is, in a Keynesian perspective, analysed mainly as an effective-demand problem and not as a necessary input in the process of social reproduction²¹.

However, the idea nurtured by residents and policy makers as to what must be considered necessary, adequate and acceptable is usually not the same and it 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 what we define as *the colour of money* i.e. of the different needs, power relationships and perceptions of residents belonging to different social groups. For instance, a methodology for auditing public budgets has to take into explicit account how women's' experience and perceptions of well-being are considerably different from men's. This is a difference rooted in a daily process of social reproduction that normally requires dealing with the maintenance of bodies, identities, domestic spaces, personal and social relations. The answers to the question "*how to live?*" are gendered because there are relevant gender differences in the answers to the questions *what to do, what for* and *for whom?*

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

²¹ 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).

allows for an extension of the well-being perspective to include the gender division of labour and responsibility in the household²³. 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 a hidden social vulnerability, normal at general level, 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 weakens women's social negotiations and can expose them also to 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 recognize 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 aspects²⁴. 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 focused 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 personal relationships (Picchio, 1996). In this way the distribution of responsibilities towards the quality of life ultimately becomes also a problem of social and political negotiations.

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, profit and non-profit. (Budlender, 1996; Picchio, 2003).

3.1 Modena Provincial District' budget.

The Modena Provincial District includes several municipalities, of different sizes and productive structures, some of them world famous for their very dynamic industrial districts²⁵. The Modena District ranks among the very first in Italy for per-capita income and has a distribution of income

²³ On the dimensions of unpaid work of social reproduction and its role in the Italian economy see Picchio (Ed) (2003).

²⁴ In this regard, the special issue of *Feminist Economics* on Amartya Sen can be usefully consulted. In particular, see Robeyns (2003).

²⁵ The total population is around 650.000 people.

among the most equitable in Italy. It has also a strong democratic tradition, women's activity rates are over 60% and public childcare is internationally known for its quality and widespread coverage²⁶. 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.

The provincial government is structured in Departments led by *deputies* (*assessori*) who are political figures nominated by the provincial president who is elected by citizens. The Departments' expenditure is organised in *responsibility centres* (*centri di responsabilità*) headed by administrators who design programs and supervise public spending in specific projects. The financial budget is presented in the *Yearly Forecast Report of the Provincial Board* (Amministrazione Provinciale, 2003), used in this paper to design the well-being matrix.²⁷

²⁶ A detail survey of living conditions in the Modena Municipality and Provincial district can be found in Baldini and Silvestri, 2004.

²⁷ Other official documents can be used to specify the District responsibilities with regard to local well-being. It has to be noted that the Provincial District interacts with other local governments, such as the Region and the Municipalities. The institutional division of functions among the different local government levels is set by law, and at present is undergoing major changes.

| 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 | Being informed |
|---|----------------------------|----------------------------------|-------------------------|----------------|----------------------------|-----------------------|--------|----------------|----------------|
| Departments | | | | | | | | | |
| 1. Education and Training | | | | | | | | | |
| 2. Environment & Civil protection | | | | | | | | | |
| 3. Roads, Transport and Buildings | | | | | | | | | |
| 4. Food and Agriculture | | | | | | | | | |
| 5. Economic policy, human resources & equal opportunities | | | | | | | | | |
| 6. Tourism, Culture and Sport | | | | | | | | | |
| 7. Urban & territorial planning | | | | | | | | | |
| 8. Labour, Welfare, Non-profit Sector and Migrants | | | | | | | | | |
| 9. Budget, administration, EU, Institutional affairs | | | | | | | | | |

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

The matrix is constructed by relating the existing nine Departments (in the rows), and translating the sense of their institutional functions and policies into a list of capabilities (in the columns). The symbolic impact of this double-entry table is to put the administration in direct relation with residents' living conditions. The listed doings, beings and feelings represent the well-being dimensions explicitly assumed as political responsibility by the

local government in order to enable male and female residents to function . in a social context.

The matrix is extended to include the usually hidden capability of caring that plays a basic role in individual and social well-being²⁸. Caring for oneself and others is, in fact, 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 and for one's self requires time, self-confidence, adequate space, resources, if it is not to be degraded, into self-destruction, cynicism and/or depression.²⁹

The process of forming each capability requires different contributions, co-operation and sharing of responsibilities among the different departments. For instance, a person's education requires teaching, buildings, roads, transports, healthy food, equality of opportunities, culture, sport, resources and subsidies, information, etc. But all the Departments involved in the various provisions which are needed to form and sustain the capability of being educated have to be aware that their function, among other things, is to co-operate in the common effort of providing the conditions for the multidimensional well-being of residents. 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 co-ordinate internally and with other local, regional, national and international institutions. Coordination that constitutes the function of Department. n. 9.

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 dimensions beside its specific one. For instance, the Department of Education and Training has its own specific responsibilities but also impacts on the other capabilities of residents, such as being able to move, to live a healthy life, to care, etc. Thus, the interaction of different human dimensions, not separable in a state of well-being, becomes a relevant problem for the administrative organisation and structure. Young students learn better if they are cared for, have leisure and live a healthy life, because their body, mind and emotions cannot be separated³⁰. Nevertheless there is a problem of right proportions, balancing and breaking points. For instance, they need to be cared to feel secure, but not too much to be

²⁸ In caring we include also the unpaid work for the maintenance and transformation of goods and commodities necessary and convenient for daily livelihood.

²⁹ On caring as capability see UNDP, 1999, pp. 77-83.

³⁰ 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.

autonomous and stand on their feet. Social breaking points could be indicated in young-people suicidal rates and depressions, while a breaking point for the capability of accessing resources could be indicated in long term unemployment.

Well-being gives the general sense of public expenditure, programs and projects provide the information on the specific actions whose gender impact has to be assessed and, finally, the money spent indicates some relative dimensions of the distribution of resources among Departments and projects. Nevertheless money has to be *coloured* and *weighted* using a metric that is consistent with a human development approach. As we have seen in the case of women, the assumption of a neutrality of money is a major source of ambiguities. Money has many colours, according to social-groups inequalities and their power relationships with the state and employers in the labour market. To have some idea of how public money, is spent and raised with taxes and tariffs, it is necessary to gather disaggregated information on the policy impact on different social groups and assessed in terms of well-being objectives in a human development space. 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 according to gender and social group (as migrants), but also the way capabilities themselves are conceived can be different according to gender and social group. For instance the capability of accessing a secure place to live in is different for men and women, not only for women's lower incomes, but also for their higher dependency, greater unpaid work and domestic vulnerability, et.. The case holds for migrants too. To this regard, a gender auditing, using an extended, reproductive capability approach, can be fruitfully used to disclose also discriminatory conceptions of the well-being of male and female migrants.

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.³¹ 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 objectives and the political responsibilities assumed³². This final phase is both technical and political. Well-being, as we have seen, concerns residents

³¹ In 2004 a new step has been undertaken to produce a women's budget of the Modena Provincial District using a capability approach and more detailed results have been obtained, but they are not yet made public.

³² In conceptual terms there is not a precise level of adequacy. Some dimensions of it can be indicated with some rigour using 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 nor too little*.

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. Thus a human-development valuation of can provide also a common language for expressing tensions, and this would be a very important result of a well-being approach to budgets auditing.

Finally, a women's 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 economic development could emerge. The quality of life is, in fact, embedded 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. But, what is more important, this approach discloses the fact that the sense of the economic activities dealing with the provision, distribution and exchange of monetary resources, can be in tension with the well-being of the population. In this respect, the auditing of public budgets in a well-being approach could become a fruitful exercise of self-reflection and a tool for efficient spending and taxation. It 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 the role of local well-being as social capital. In order to define it as capital 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. This means that we need to find appropriate indicators to be added to the equal-opportunity ones presented in the second section to indicate gender inequality. Moreover, on the basis of a well-being approach some aspects of the economy, usually hidden and/or marginalized, can be shown to have an important effect on the provision of necessary resources and on its dynamics. The Modena district could allow for co-operative networking, democratic bottom-up auditing, women's agency, the introduction of a less reductive overview of economic and social connections and, finally, a deeper awareness and better evaluation of policy impact. It is a difficult and long way to go, but is worth to try.

4. The capability approach at the municipality level

After applying the capability approach at regional and district level, the aim of this last section is to apply it 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 showed that the Municipality acts in a network that we try to describe in Figure 1.

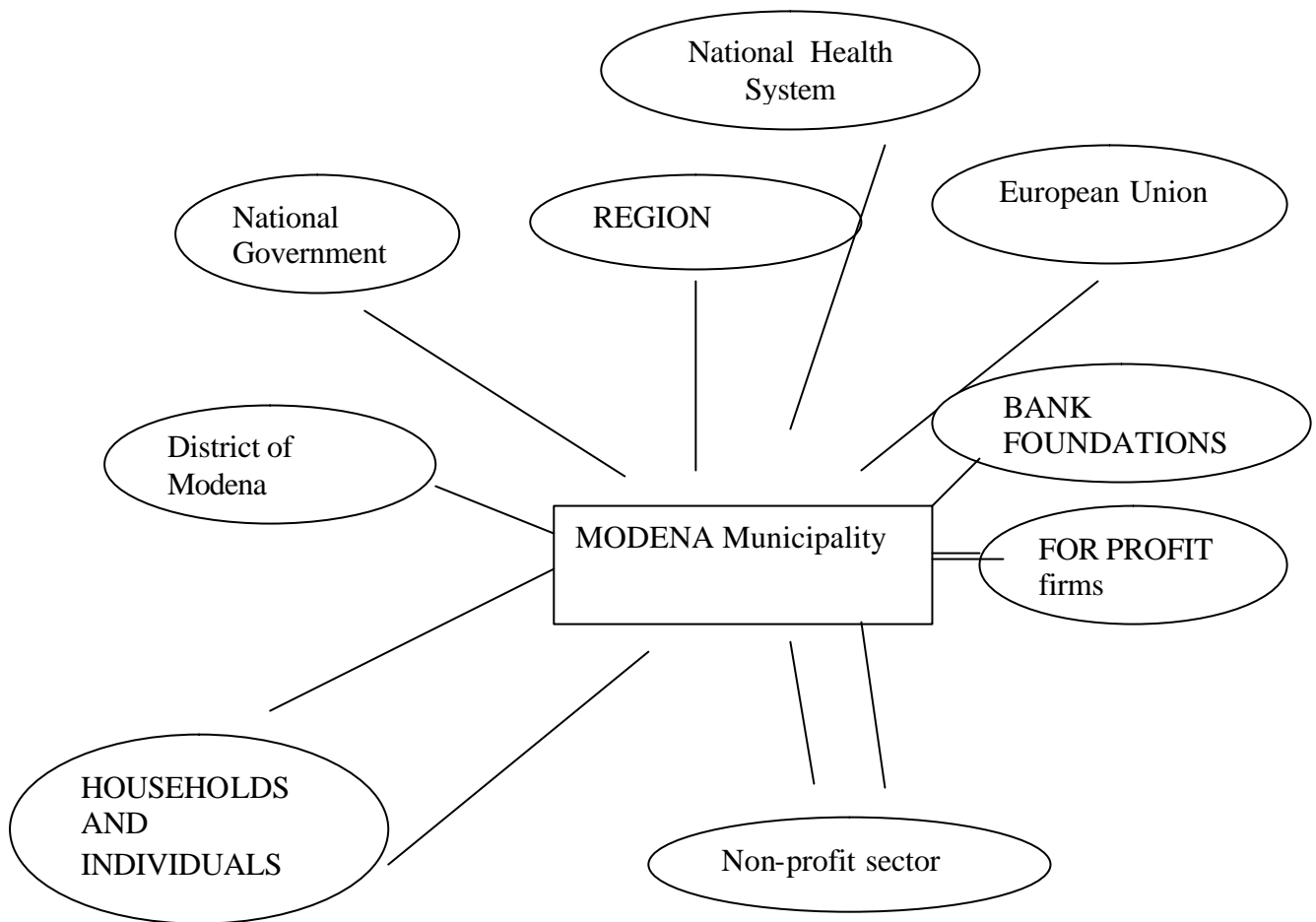


Fig.1 -The Municipality in an extended macroeconomic flow

The municipality collects money from 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.³³ A participative approach to planning is explicitly perceived in different reports of the local administration (i.e. Comune di Modena 2001b). In this documents 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 maintained a stable relationship with the local government to promote women's participation in political life and to monitor 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 health³⁴.

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 an 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

³³ 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.

³⁴ Expenditures in this regard amounted to 147.324,08€ out of an expenditure total of 221.722.177 in the 2001 budget.

municipality³⁵ in the light of the empowerment dimensions identified in Section 2.1.

| 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.³⁶ Consistently with Robeyns' (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

³⁵ See Anessi Pessina (2000) and Vandelli (2000) for definitions of local government functions.

³⁶ On the different levels of generality that can be followed in drawing a list of capabilities see Robeyns (2003).

perspective and ask for more data to be collected to make the list effective.³⁷ 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 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

³⁷ 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).

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,³⁸ women are the main providers of caring and other domestic activities inside the family.³⁹ 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 supply⁴⁰. With regard to female activity rates Modena women's employment rate in the year 2000 was 60% as against 39.6% at national level.⁴¹ 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 on September 2000 was on average 6.5% ranging from 1% in Campania and Calabria to more than 17% in Emilia Romagna).⁴² 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

³⁸ Addabbo and Picchio (2004), using ICESmo data on the socio-economic condition of households living in Modena collected by Capp.

³⁹ On the unequal distribution of time inside Italian couples with regard to total work see Addabbo (2003) and the macroeconomic consequences of this see Picchio (2003).

⁴⁰ 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.

⁴¹ Comune di Modena (2000).

⁴² Istituto degli Innocenti (2002). 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.

programmes, types of furnishing, etc.) under an agreement established with the Municipality was 4%.⁴³ 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.).⁴⁴ 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 - 2001.⁴⁵

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 Emilia Romagna to the Municipality targeted on the provision of child-care services, but also transfers coming from other city institutions.⁴⁶ 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.⁴⁷ 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.

⁴³ Comune di Modena (1999).

⁴⁴ On the diffusion of this type of services see Marchesi *et al.* (1998) and Ecchia *et al.* (2001).

⁴⁵ For a more detailed analysis of the expenditure on this service see Addabbo *et al.* (2003).

⁴⁶ 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).

⁴⁷ Comune di Modena (2002b) Piano di Zona, p.52.

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 '*assegno di genitorialità*' 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.⁴⁸ 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 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.

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)⁴⁹ 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

⁴⁸ See Addabbo and Olivier (2001) for a presentation of the simulation whose results are summarised in this section.

⁴⁹ For the criteria used by Modena municipality to access public kindergarten and its impact on women's labour supply see Addabbo and Olivier (2001).

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 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.⁵⁰ 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

⁵⁰ 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).

life time.⁵¹ 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.

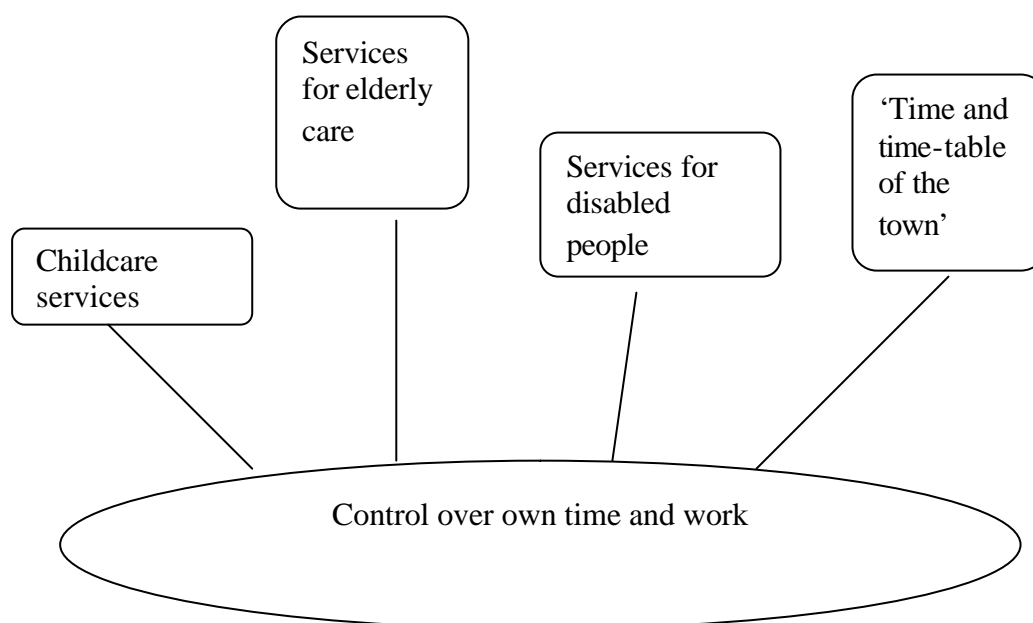


Fig.2 - Services supplied by Modena municipality on the empowerment dimension of control of one's time and work.

⁵¹ 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 but it is not-ontologically individualistic since it assigns an important role to social and institutional conditions of conversion of capabilities into a higher quality of life. This involves an open and participative process of definition of well-being, based also 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. In this context, public policy and social participation need a new metric and well-being matrixes and gender-sensitive well-being indicators are needed. They can be developed only in a process of social participation whereby different perceptions and ideas of well-being are confronted.

Moreover, we take into account women's unpaid social reproductive work, living and working times, adequacy of incomes in relation to social conventions and different power relationships in the access to resources. This makes it possible to present 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 governments in the implementation and maintenance of a conventional extended standard of living.

Finally, by focusing especially on the capability of caring we disclose a fundamental contribution to the process of social reproduction of individual capabilities and see how the network of local institutions may operate to sustain it through services that, directly or indirectly, provided by the local governments may affect the capability of caring itself and the whole space of human development.

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