

Gender budgeting education in a well-being approach:  
An application to Italy and Spain

Tindara Addabbo,\* Lina Gálvez-Muñoz,\*\* Paula Rodríguez-Modroño\*\*

\*Well\_B\_Lab\*, Department of Economics Marco Biagi,

University of Modena and Reggio Emilia

\*\* Pablo de Olavide University

This version

Preliminary and incomplete

14 October 2014

International Conference at the Vienna University of Economics and Business  
Gender Responsive Budgeting: Theory and Practice in Perspective  
November 6 – 8, 2014

## **Abstract**

Well being gender budgets allow to analyse institutions' budgets in a double perspective: gender and well being. The well being space is defined according to Sen & Nussbaum's capabilities approach in its multidimensions and with reference to the factors that can affect each capability development into observable functionings. Capabilities can be defined as the individual's opportunities to achieve functionings (like being well-sheltered, in good health, educated) their development differs by gender and is affected by individual, family and institutional factors. This paper will focus on well being gender budgets of institutions that affect education at tertiary level in Italy (University of Modena & Reggio Emilia in Modena) and Spain (Pablo de Olavide University in Seville). We will describe the phases followed in the analysis and the main results obtained leading also to the planning of further research activities & policy implications.

# Gender budgeting education in a well-being approach: An application to Italy and Spain

## 1. Introduction

The focus of this paper is on well being gender budgeting applied to education. **Well being gender budgets** evaluate public budgets and policies from two perspectives: gender and well being (Addabbo, Lanzi & Picchio, 2010). The latter is defined following Sen and Nussbaum's capability approach that define well-being in its multiple dimensions and complexity, departing from an evaluation based exclusively on income or commodities. Individual well-being is a set of capabilities representing potential functionings, a person's freedom in terms of available functionings (the beings and doings of a person) given his/her personal features and command over resources (Sen, 1985). Capabilities can therefore be defined (Sen, 1985, 1993, 1999) as the individual's opportunities to achieve functionings (like being well-sheltered, in good health, educated). The achievement of functionings is affected by 'conversion factors' (Robeyns, 2003, 2008) related to the environment, society, and the individual. Institutions can play a key role in affecting conversion factors.

As far as Italy is concerned, well being gender budgeting (WBGB) has been applied at local level starting from its first application to the analysis of Region Emilia Romagna, Modena district and municipality in 2002, and touching other Emilia Romagna districts (Bologna, Forlì) and other regions (regions Lazio and Piedmont) and districts (Rome district). An assessment of different experiences carried out in Italy can be found in Addabbo, Badalassi, Corrado & Picchio (2011).

In this paper attention will be paid to a particular capability connected with education and to the application of WBGB in educational organizations at the tertiary educational level in two different countries.

But let's start by defining **education in the capability space**.

Following Martha Nussbaum (2003) reference is made to a more extended definition in terms of senses imagination and thought.

“Being able to use the senses, to imagine, think, and reason and do these things in a “truly human” way informed and cultivated by an adequate education, including by no means limited to, literacy and basic material skills.”

Attempts to measure its development and to provide an analysis of its determinants in the capability approach have been made in Addabbo, Di Tommaso & Maccagnan

(2011), Gálvez, Domínguez, Rodríguez & Matus (2013) and Rodríguez, Gálvez, Matus & Domínguez (2014) showing how different actors affect its developments and how more microdata are needed in order to measure it in its complexity and multidimensionality.

The role of education in expanding individual capabilities, in value formation and the possible obstacles in fostering agency in higher education have been discussed amongst others by Vaughan & Walker (2012) with reference to higher school education in South Africa and by Spreafico (2012) with reference to the case of Barnard College in New York. The latter derives a list of capabilities specific to the tertiary education institution object of analysis and go ahead in analysing to what extent the capabilities are valued and assessed by Barnard College students.

Here the focus is on well being gender budgeting of institutions that have as main goal education at tertiary level. The cases of the University of Modena and Reggio Emilia in Modena (Modena, Italy) and University Pablo de Olavide (Seville, Spain) will be presented.<sup>1</sup>

## **2. The Institutions analysed**

University of Modena & Reggio Emilia (Unimore) was created in the first half of the XII century. Since 1175 the University undertook many changes also in relation to the history of the town and Italy. After the national unification in 1861 it was considered as a minor university and this determined a decrease in the number of professors and students enrolled in the university. This minor role was cancelled by Law in year 1887 contributing to the development of the university and the establishing of new faculties (like the faculty of Economics in 1970 or the faculty of Humanities in 1999). In 1998 Modena University became the first network university in Italy with two headquarters in Modena and Reggio Emilia, Unimore has one budget and a unitary governance with educational and administrative activities distributed amongst the two nearby towns (Modena 179,095 Reggio Emilia 162,570 inhabitants at 01-01-2012, the two towns being around 25 kilometers apart). Statutory changes (required by the Italian Ministry of Education and Research to each university) occurred in 2012 implying a change in the structure with a

---

<sup>1</sup>This experimental project has been coordinated by Tindara Addabbo, the research team included also Professor Paula Rodríguez Modroño (Dpto. de Economía, Métodos Cuantitativos e Historia Económica, Universidad Pablo de Olavide), Professor Francesca Corrado (Well\_B\_Lab\*, University of Modena & Reggio Emilia), dr Ilaria Pagliuca & dr Chiara Benassi (University of Modena & Reggio Emilia). We thank Dr Ilaria Pagliuca and Dr Chiara Benassi for the elaborations carried out within the project, Dr Tommaso Pirotti for the help provided in setting the web survey for Pablo de Olavide University and the administrative offices of the two institutions for the data provided. A previous version of this paper has been presented at the 'Gender well-being and budgeting: international experiences, local opportunities' organized by the Istanbul University in May 2013, we thank the participants for their stimulating comments.

lower number of departments assembling both educational and research roles that in the past were distributed by faculties and research departments. In 2012 the total number of students enrolled was 20,894.

University Pablo de Olavide (UPO) is a public university established in Seville in 1997. The students enrolled in 2012 were about 11,000 (57% women). The metropolitan area of Seville has a population of 1,519,639 in 2011 and students may study in 2 public universities or 3 private ones, being the largest the University of Seville with more than 60 thousand students. Even though it is a very young university, the UPO ranked second in research productivity among Spanish universities in 2011 and 2012. The UPO has a Unit for Gender Equality and all Strategic Plans of University Pablo de Olavide (the third one is being implemented from 2014 to 2016) incorporate the gender perspective in all areas of university life.

More information on the structure and history of the University of Modena & Reggio Emilia are available at <http://www.international.unimore.it/> and on the University Pablo de Olavide at <http://www.upo.es/portal/impe/web/portada?lang=en>.

We will summarize the main results obtained together with key methodological issues. The well being gender audit has been conducted on the 2011 budgets of the two universities and on the 2009/2011 Universidad Pablo de Olavide Strategic Plan (Plan Estratégico) and the 2011/2013 Performance Plan of the University of Modena & Reggio Emilia (2011-2013). Revenues and expenditure have been analysed under the double well being and gender perspectives with special reference to a subset of capabilities.

### **3. Gender Budgeting Universities in the well being approach**

The capabilities have been selected by using the double approach based on a participated definition of the most important capabilities according to students in the two universities as compared to the list of capabilities related to the functions and the projects carried out by the two universities.

To get the participatory list of capabilities a survey has been conducted on a sample of 226 (52% male) students attending degree courses in economics in the University of Modena and Reggio Emilia and 132 students (47% male) who attended the degree courses in Labour Relations and Human Resources and Business Administration in the University Pablo de Olavide. The students involved in the participatory part of the well being gender budgeting have been selected on the basis of their attendance of lectures on the definition of well being in the capability approach. The survey carried out on the University of Modena & Reggio Emilia students was based upon the list of the capabilities produced by

the high school Cattaneo & Deledda students (Corrado, 2010) and they were asked to state those capabilities that were more relevant and on which the University could have an effect while for the Universidad Pablo de Olavide a set of capabilities that were considered as relevant on the basis of the aims of the University, its budgets and plan of strategic activities.

The results of the survey showed that in both universities the capabilities that students consider as most important are the capabilities of accessing knowledge followed by the capability of working. In the case of the University of Modena & Reggio Emilia (Unimore) students attached a higher weight (similar to the capability of working) to the capability of living in safe and adequate places. We should notice that Modena district has been severely affected by 2012 earthquake. In the case of the UPO, the third capability that the students chose as most relevant was the capability of participation in social, economic and school life. If the first capability chosen by both female and male students is access to knowledge, women in UPO gave more weight than male students to the capability of working. This is consistent with the lower employment rate shown by women with tertiary education in Andalusia (in the age group 25-34 the employment rate in 2011 was 65% for women and 72% for men). There are no significant gender differences for Unimore students as far as the most relevant capabilities are concerned.

Gender auditing on the universities' budgets has then been conducted with a special focus on the capabilities of access to knowledge and of working crossing the participatory criteria of selecting the most relevant well being dimensions with the intrinsic capabilities as resulted from the Universities' Statutes & budgets analyses matched with the institutions education role.

The revenue side analysis conducted on the Unimore budget shows that women contribute more to the revenues from students' fees (that represent 29% of total revenues in 2011) being 54% of the students enrolled. Moreover the criteria established by the Italian Ministry of Education and Research gives additional resources according to students' performance and women overcome male students in their university performance.

Turning to expenditures the analysis showed the expected higher weight of expenditures devoted to access to knowledge. Expenditures that have been considered to have the greatest impact on the capabilities from a gender perspective have been attributed 100% to the capability in the gender analysis that followed. Amongst the expenditures that have been considered having a greatest direct impact we can mention:

- for UPO: Universidad y Empleo de Mujeres (Universem) programme (that has been developed together with the Andalusian Women's Institute and was at its fifth edition in 2011) aims at improving working opportunities for women graduated at UPO by means of orientation courses, additional training, stages and assistance in the job search activities. The resources provided to this programme are 0.04% of the total current expenditure.
- for Unimore, amongst 23,106€ additional benefits paid to employees (representing 0.0001% of the total expenditures), there are also expenditures devoted to child care and to purchase teleworking positions for employees.

Policies suggestions from this first experimental analysis can be addressed to the Institutions both in terms of data availability (the lack of data disaggregated by gender has been reported to the Administration and more data have been required to further investigate the distribution of resources according to the beneficiaries of the services) and in terms of policies. Amongst the policies suggestions, we suggest to:

- establish or improve the education activities on diversity and gender studies
- design online learnings courses and teleworking that can alleviate the problems in attending courses or working especially for people involved in care activities
- ensure that parental leaves, part-time or teleworking activities, that are more often undertaken by women to improve their work-life balance, will not penalize employees that take them in terms of their career perspectives and position within the institutions
- improve the orientation and assistance in job search activities in relation to the higher difficulties faced by women in their access to work.

Given the network of institutions that affect the development of access to knowledge and work we can formulate policies suggestions also to other institutions. For instance attention should be paid by region Emilia Romagna (where the University of Modena & Reggio Emilia is located) in the new Law on Equal Opportunity to promote programmes that address gender equality in working and education by providing a system of incentives. The experience of the G+ programme in the Andalusia region can be considered as a good model on this regard. Andalusian Law 18/2003 on Fiscal and Administrative Measures established the legal obligation to accompany the regional budget with a Gender Impact Report. The budgetary programmes comprised within the region's budget are classified under the G+ Project<sup>2</sup> since 2007 according to their potential to promote gender equality, in order to concentrate the funds in those programmes with the

---

<sup>2</sup> For more information on G+ project see [http://www.juntadeandalucia.es/haciendayadministracionpublica/planif\\_presup/genero/publicaciones/Proyecto\\_Gm\\_v\\_2009\\_English.pdf](http://www.juntadeandalucia.es/haciendayadministracionpublica/planif_presup/genero/publicaciones/Proyecto_Gm_v_2009_English.pdf)

greatest practical and strategic capacity to transform gender issues. We propose the Andalusia region, with reference to G+, to consider in the evaluation of the programmes in terms of the gender impact also the impact on well being dimensions that are shown to be more critical (like the capability of working).

We plan to extend the well being gender budgets analyses of the University of Modena & Reggio Emilia and University Pablo de Olavide. Further developments include:

- time series analysis. In the UPO this can allow to highlight the changes occurred after the adoption of the G+ method by the Andalusia Government addressing gender inequality. The G+ programmes have increased their weight over the years and represent 73.1% of the credits in the 2014 Andalusian Budget; thus, three out of four euro in the regional budget are spent on programmes that have the greatest potential for contributing to equality between men and women. However, further analysis is needed in order to evaluate the role of gender budgeting in the progress in achieving gender equality in the University system in Andalusia. In Unimore this can allow to disentangle the effect of the changes occurred in the organization of the University with the occurred Statutory changes;
- extend the analysis on the well being dimensions to a wider sample of students to get a more heterogeneous population with regard to living/employment status (there is a consistent number of working student)/gender/degree courses attended. This will also require the Institutions to promote a wider education investment on human development and gender perspectives in the different courses;
- extend the analysis to the staff to develop the internal matrix analysis of the Institutions;
- administrative data were not always disaggregated by gender and have been attributed to gender by using available gender indicators (like the % of students enrolled by gender). The requested gender disaggregation of beneficiaries of the services (like stages/orientation courses open to all students) can be used for the gender classification of expenditures.



## References

Addabbo, Tindara, Di Tommaso, Maria Laura, Maccagnan, Anna (2011) 'Gender differences in Italian children's capabilities', Working Paper No. 08/2011 Department of Economics 'S.Cognetti De Martiis', University of Turin, ISSN: 2039-4004.

Addabbo, Tindara, Lanzi, Diego, Picchio, Antonella (2010) 'Gender Auditing in a Capability Approach', *Journal of Human Development and Capabilities*, Vol. 11, Issue 4, November 2010.

Addabbo, Tindara, Picchio, Antonella, Corrado, Francesca, Badalassi, Giovanna (2011) 'A Social-reproduction and Well-being Approach to Gender Budgets: Experiments at Local Government Level in Italy' Chapter 5, in Florence Degavre, John Eriksen, Elisabetta Addis and Paloma de Villota (eds), *Gender and Well-being. The Role of Institutions*, Ashgate, 2011.

Corrado, Francesca (2010) 'De-costruzione del bilancio scolastico nell'approccio ben-essere: Che genere di bilancio?' ('De-constructing the school budget in the well-being approach: What kind of budget?') *CAPPaper* n. 74 downloadable at <http://www.capp.unimore.it/pubbl/cappapers.html>.

Gálvez, Lina, Domínguez, Mónica, Rodríguez, Paula, Matus, Mauricio (2013) 'Time use and children's well-being: implications for public policies', *Fiscal Studies*, 34 (3): 373-389.

Nussbaum, Martha (2003) 'Capabilities as fundamental entitlements: Sen and social justice', *Feminist Economics*, vol.9 (2-3): 33-59.

Robeyns, Ingrid (2003a) 'Sen's Capability approach and gender inequality: Selecting relevant capabilities', *Feminist Economics*, 9 (2-3), 61-92, July-November 2003.

Robeyns, Ingrid (2003b) 'The capability approach: an interdisciplinary introduction' mimeo, Amsterdam: University of Amsterdam.

Robeyns, Ingrid (2008) 'Sen's capability approach and feminist concerns' in Alkire S., Comim F., Qizilbash M, (eds), (2008) *The capability approach: concepts, applications and measurement*, Cambridge University Press.

Rodríguez, Paula, Gálvez, Lina, Matus, Mauricio, Domínguez, Mónica (2014) 'Allocation of Parental Time and the Effects on Children's Well-being'. *Journal of Education and Human Development*, 3 (1): 191-209.

Sen, Amartya K. (1985) *Commodities and Capabilities*, North Holland, Amsterdam.

Sen, Amartya K. (1993) "Capability and Well-Being", in Nussbaum M.C., Sen A.K. (eds) (1993) *The Quality of Life*, Oxford University Press, Oxford, pp.30-54.

Sen, Amartya K. (1999) *Development as Freedom*, Alfred Knopf, New York.

Spreafico, Alberta (2012) "Liberal Arts Education and the Formation of Valuable Capabilities", in Alejandra Boni and Melanie Walker (eds.) *Universities, capabilities and human development. New ideas and practices for the University of the XXI Century*, Routledge.

Vaughan, Rosie Peppin & Melanie Walker (2012) 'Capabilities, Values and Education Policy', *Journal of Human Development and Capabilities: A Multi-Disciplinary Journal for People-Centered Development*, 13:3, 495-512