

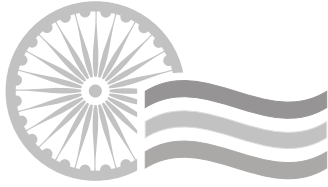
Are the Economic Stimulus Programmes Fair for Everyone?

A Budget-oriented Gender Analysis of
Economic Stimulus Packages I and II

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**Research Group
Women and Gender Research**





Are the Economic Stimulus Programmes Fair for Everyone?

A Budget-oriented Gender Analysis of
Economic Stimulus Packages I and II

Expert opinion commissioned by the Women and Gender
Studies Research Group of the Friedrich-Ebert-Stiftung

Mara Kuhl

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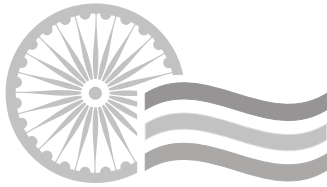
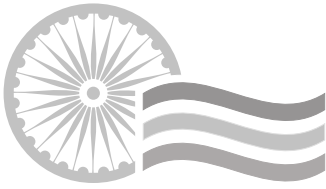


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Preface

It was only recently that the European Parliament called on the EU member states to »carry out an equality impact assessment before starting to implement their austerity measures in order to avoid a situation in which women are disproportionately affected by them«.

Data and impact assessments of this kind are to be used as a basis on which »to design measures to promote economic recovery in respect of which the needs and specific situations of women and men are taken into account, in particular within the framework of integrated policy solutions promoting equality (gender mainstreaming) and within the framework of a budget analysis taking into consideration the equality aspects (gender budgeting)«.

To date, the member states have sought to meet this challenge only to a limited extent. It is quite evident that when money is distributed or saved this has real social effects, in particular with regard to gender relations. Gender relations are not structured in an egalitarian way with regard to money, power and employment either in Europe or elsewhere. And wherever these relations do not meet the standard of equality a critical evaluation must be made of whether a planned allocation of funds or cuts are likely to change anything in that regard. Such a gender budgeting analysis, in fact, must be carried out for the national budget as a whole, although it can be tested only on the basis of the actual effects of the economic stimulus programmes.

The Austrian government, by incorporating the obligation to carry out gender budgeting analyses in the Constitution, has created exemplary conditions for this purpose. In future, we can count on many gender budgeting analyses from Austria. In Germany, on the other hand, this is still a long way off. This applies to both the Federal budget and state budgets; only a few progressive local authorities have so far examined whether the allocation of funding complies with the constitutional duty of equality of opportunity. The major economic stimulus programmes of 2008 and 2009, estimated at around 187 billion euros, have so far not been subject to gender-specific analysis neither before they were passed nor after they came into force. In Germany, there are a number of circumstances which make it difficult to process the data needed for a

legislative impact assessment from a gender perspective. Not only are the relevant institutions lacking, but also the political will and the necessary specialist skills, including know-how related to the processes involved.

The text presented here by specialist in administrative science Dr Mara Kuhl cannot make up for these deficiencies. This represents new terrain for Germany. However, this exemplary analysis is able to show what crucial knowledge can be obtained when, subject to constraints on both time and resources, a gender analysis is made of the available data and key gender policy questions are raised. This Expert Opinion, after an empirical examination, comes to the following conclusions:

in the area of transport, the planned concessions will primarily benefit a subgroup of men;

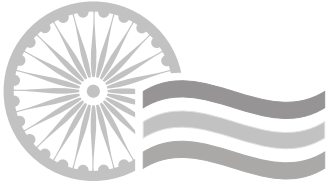
- the labour market measures will secure mainly regular employment which is predominantly characteristic of a subgroup of men;
- there are many defects in the process of allocating financial support from an equality perspective, since only men and male dominated branches are represented in the relevant bodies;
- the fostering of broadband technology is characterised by a male connoted approach, which will considerably diminish the efficiency of this strategy;
- the whole area of unpaid work especially care work is barely affected by the billions of euros being spent, which, given the lack of investment there, is incomprehensible.

Best from an equality standpoint would have been if the measures in the economic stimulus programmes had been examined in terms of their effects on equality before adoption. The present analysis can show that the effort would have paid off.

Besides these results the analysis presented here can also demonstrate what gender analyses of budgets and measures look like. They are supposed to point out shortcomings in (official) statistics and encourage all persons responsible to follow the path illustrated here.

Dr Barbara Stiegler

Director of the research group
Women and Gender Studies
Friedrich-Ebert-Stiftung



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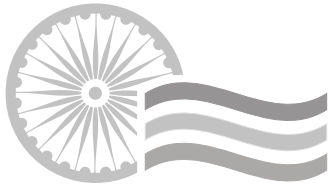
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Introduction

During crisis-free periods policies aimed at preventing economic fluctuations are the subject of heated controversy. In simple terms, there are two opposing camps. First, critics of state intervention, who are generally influenced by Anglo-Saxon neoliberal economics, view state activity primarily as competition and as crowding out actors in the private economy. Second, advocates of an active state who emphasise that the state must do more than merely guarantee governance structures for economic actors. The latter criticise the premises of neoliberalism which tend to under- or overrate central aspects of the real world, such as people's ability to process information. For example, neoliberalism takes no account of the veil which obscures the perception of workers in particular and prevents them from telling apart nominal and real wages (»money illusion«). Another example is their belief in perfect markets. The various positions and debates on cyclical policy fail to take into consideration the underlying structures of the economy, such as the distribution of unpaid and paid work and the necessary conditions for economic activity provided by reproductive and regenerative work. This part of the economy which is essential for its functioning but is rendered invisible, has been brought into the spotlight by innovative economists under the term »care economy«. The expectation is that a more rounded understanding will make it possible to shape economic processes more sustainably and fairly. In this way, too, all economic costs can be internalised in accordance with the originator principle and the foundations of life can be preserved.

Another key aspect of the structures of the economy which is usually paid little attention by experts is that they are ordered on a gender basis: both the disregarded ones and the visible ones. Paid production work and unpaid (re)production work are unequally distributed between women and men, and they are included unequally in the national accounts as a contribution to a nation's potential. The labour market is ordered vertically in other words, related to hierarchical levels and horizontally, related to occupations and activities in accordance with the structural category of gender. The distribution of various conditions of employment with permanent full-time contracts and pension entitlements or with temporary contracts, working part-time or in a mini-job

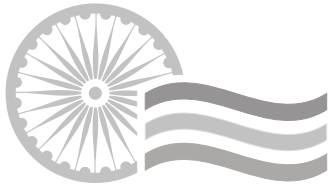
and with much greater risk of old age poverty is »gendered«. The very designations »regular employment« and »atypical employment« show that regardless of quantitative considerations the general orientation is towards male dominated conditions of employment as the standard, while female dominated conditions of employment are regarded as unusual and as a special case.

Cyclical policy always has an impact on these gendered economic structures since resources are distributed, opportunities and access to resources are created or altered and economic decision-making by households, with their internal microeconomic division of labour, is influenced and so on. The state, in terms of its task as guarantor and shaper of economic conditions, is therefore, whether it wants to be or not, a key shaper of gender policy structures and of gender relations in society.

Against this background, amidst the crisis, the question of the stimulus programmes' gender balance has been raised. In the hustle and bustle of state intervention the state's neglected multisectoral task of gender equality (Constitution Art. 3 para 2) also becomes the focus of attention in the key area of the economy.

The aim of this Expert Opinion is to cast a critical look at the economic stimulus programmes and their substantive focuses and orientation. By means of gender analysis we shall examine the balance or imbalance of what are the biggest economic stimulus programmes in German history in terms of gender equity. The question that will be asked is as follows: Is the state ameliorating the effects of the financial and economic crisis for males and for females to the same extent? Is the state contributing with its policies to the constitutional democratic task of real equality of opportunity with regard to the support being provided during this crisis period?

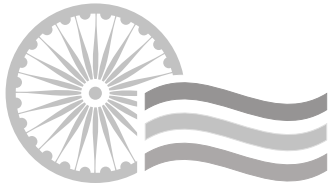
The economic stimulus packages contain a wide variety of measures such as subsidies, guarantees, social transfers, allowances, tax concessions and concern a wide range of policy areas (labour market, tax law, transport policy, social policy, information technology and so on). For the purposes of this Expert Opinion this means that not every measure however fascinating and relevant they might be



Introduction

can be presented individually. Instead, a selection must be made for more detailed examination. Accordingly, it means that our considerations will necessarily not be exhaustive. However, a summary and evaluation of the economic stimulus packages in accordance with budget criteria and an analysis of selected measures from different policy areas will make it possible to assess the equal opportunity quality of this crisis intervention.

I would like to thank the network Gender Mainstreaming Experts International (GMEI), in the context of which the idea for the Expert Opinion originated, in particular Ms Spangenberg, Dr. Erbe, Dr. Frey, Ms. Frau Parlar and Dr. Schambach for encouragement, expert advice and support.



Equality as Quality Criterion of State Crisis Measures: Assessment Approaches

The aim of this Expert Opinion is to consider the economic stimulus packages in terms of equality for men and women and to ask, on the basis of selected measures in different policy areas, whether they are fair and balanced. Does the state support men and women to the same extent in getting through the crisis; for example, does it support them in different roles, such as employee or carer/provider, in the same way? Does the state support different sectors of the economy equally and regardless of gender structure – male-dominated, female-dominated and balanced sectors – as well as independently of implicit societal assignments with regard to productive (connoted as »masculine«) and reproductive (connoted as »feminine«) sectors?

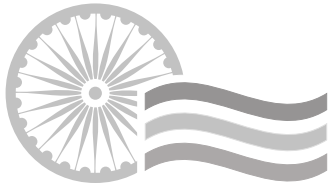
In crisis periods, swift action is required to address urgent needs and to cushion the impact of negative effects. At first sight, one might think that the question of gender equality should be subordinate to these aims. Rapid action in crisis periods is certainly important, but only the right kind of rapid action ameliorates crisis effects and stabilises the state, the economy and society in the face of further turbulence. However, what the »right« action might be in times of crisis is uncertain. Social policy goals, also within the framework of economic policy, must form part of the answer to this question. Equality for men and women is a central aim of society and should be a guiding principle also in crisis periods to ensure that decision-making is wise and oriented towards the future. Unfortunately, a gender analytical perspective was not adopted ex ante by the decision-makers with regard to the economic stimulus packages, but only put forward by critics once implementation was under way. The equality aspect, however, demonstrates where old mistakes are avoided or repeated; where opportunities for innovation and for supporting the creative forces of societal self-organisation are taken or neglected; and where exclusions and tendencies towards division are diminished or reinforced, threatening social cohesion and sustainable economic development.

Gender Analyses

There is a profusion of different ways of evaluating policy measures in accordance with the quality criterion »equality«, summarised under the term »gender analyses«. These analytical instruments are basically impact assessment procedures which are used to examine ex ante, concomitantly or ex post whether particular measures contribute positively, negatively or neutrally to the development of equality. One of the aims of this evaluation procedure is to bring to the surface the implicit goals and the unintended results (output) and effects (outcome) with regard to men and women of measures formulated in a gender-

1. Knowledge concerning possible discrimination in order to assess how the measure might affect its reduction. Information for this purpose is provided by continuous gender-differentiated data by means of which gender relations in the relevant policy areas can be described. Such data are not always available in the requisite quantity.

2. An evaluation of whether, starting from the basic situation of possible existing discrimination, the measure can be shaped in such a way that men and women can have equal access to the resources being distributed. It is important to examine whether, as an indirect effect of (re)distribution, access to other resources will change. For example, the distribution of the resource »money« can affect the resource »time« since services can be bought which the beneficiary can convert into free time. Key resources to which equal access must be provided in order to achieve equality include (decision-making) power, money and (self-determined) time. Decision-making power means that affected groups can bring their own ideas and interests or have them represented on their behalf into processes in which decisions are made about them, including indirect but important issues, such as the distribution of resources and living and working/employment conditions. In our society, a central means of access to the resource »money« is adequately paid work. It provides income and protection against the risks which historically have tended to lead to poverty in Germany, such as divorce or giving birth. Time which is not taken up with gainful employment or family duties is a resource which enables one to regenerate, recover and attend to one's fundamental emotional needs, such as



free time with the family and friends; in other words, from the standpoint of society, this resource is necessary for the reproduction of labour power.

3. An evaluation of whether measures are designed in such a way that they privilege role allocations between men and women or reinforce traditional structures which give men and women different incentives for decision-making concerning access to resources.

A gender analysis encompasses various dimensions of gender in which and through which gender relations are constituted. In this way they go beyond the individualised examination of gender at the microlevel as a personality trait of individual persons.

It is at the macro-level of gender that the gender groups »men« and »women« are apprehended; in other words, the collective perspective on groups of people in society whose members, on the basis of particular characteristics, are allocated to the male group or the female group and are each treated as largely homogenous collectives. In addition, there is the level of gendered structures in accordance with which »masculinity« and »femininity«, and therewith the value of different areas of life,

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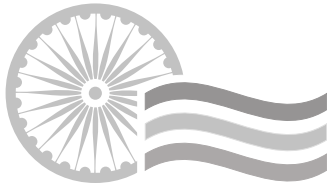
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are allocated. The structure of paid work (gainful employment) and unpaid (household) work is one example of this.

Gender Budgeting

Another effective instrument for evaluating policy outcomes in accordance with the qualitative criterion »contribution to the development of equality« is gender budgeting. This budget instrument is acquiring an increasing role, particularly within the framework of the



implementation of equality as a task which encroaches on all policy areas (gender mainstreaming), since it demonstrates, on the basis of financial flows, how men and women are taken into account with regard to government measures. Much as in the case of analyses of policy measures and programmes formulated gender-neutrally the interest in gender budgeting arises from the fact that the structure of state revenues and expenditure has different effects on the lives of women and men as a result of tax, economic and industrial policies formulated gender-neutrally and thus shapes the resource access of men and of women unequally. For example, the federal expenditure and financial structure of Germany, with the differences between the federal government, the Länder and municipalities, has considerable significance for the development of equality for men and women. Gender budgeting encompasses a multitude of approaches, depending on the involvement of those carrying it out in the budget cycle, the timing of the analysis, its aims and so on. Similar to gender analyses, which face the risk that their emancipatory contribution will be reversed (for example, due to the narrowing of the understanding of »gender« to biological gender and biological gender concepts: see GenderManifest 2006) gender budgeting also entails a certain risk, in particular on the grounds of practicability, that it will produce one-sided results. For example, some gender budgeting approaches are suitable primarily for citizen-oriented services, while financial flows for promoting institutions for example, economic subsidies remain, to a considerable extent, neglected (for more detail see Frey 2008).

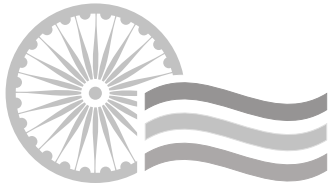
This Expert Opinion takes its inspiration from experiences with gender budgeting in German-speaking countries. Here, no gender budgeting analysis in the proper meaning of the word will be carried out, merely an attempt to relate the equality evaluation of measures to their weighting in the budget. This is what »budget-oriented« means. For the analysis of economic stimulus packages a budget-oriented approach is very promising because it is both feasible and rich in insights. First, government crisis intervention involves primarily the provision of sums of money for clearly delineated measures. In contrast to the state budget it does not involve in the first instance the distribution of funds to departments for their use. Rather, in the case of the

economic stimulus packages (mainly) specific, clearly stated sums were made available for (mainly) clearly defined measures. The individual measures can therefore be related to one another on the basis of the sums in question. For example, the outcomes of the gender analysis of measures can be related to financial volumes and thus the relative significance of the measures and their respective contributions to the development of equality can be evaluated. Since all measures are related to one another within the framework of the overall budget for the economic stimulus packages it is possible to make assertions about the latter's overall effects on the development of

See, among others, Bergmann et al. 2004; Erbe 2003; and Frey 2007a, 2007b.

The Notion of a »Care Economy« in Economic Theory

Another productive inspiration in the preparation of this Expert Opinion was the concept of the »care economy«, discussion of which is at present confined to non-mainstream economics. This approach takes into account the fact that a large proportion of the services and goods which contribute to making everyone in society better off are furnished in the form of unpaid services, in particular by women in private households and voluntary work (see Madörin 2010). These services of the »care economy«, which are prior to the market economy and maintain the production conditions of the market (among other things through the reproduction of labour power), are not, however, quantified in the national accounts and thus remain invisible as a vital contribution to the prosperity of society. Besides private care and support services there is also an area of goods and services exchangeable on a market-like basis which also counts as part of the care economy. This includes the provision of social, care, educational and nursing facilities. This work largely eludes the efficiency and rationalisation logic of the capitalist economy, which means that it cannot be captured adequately by the current methods used in economics to measure growth and productivity, as a result of which its contribution to societal prosperity is systematically underestimated. Even the branches of the care economy in which payment is received are dominated by women, so that this aspect is extremely relevant from an equality



standpoint. In this Expert Opinion the measures contained in the economic stimulus packages will be examined in terms of the care economy as a digression. The question is how the measures in question protect this realm against the effects of the economic crisis and thus safeguard the conditions under which it contributes to societal well-being.

Methodology

We shall proceed as follows with regard to the budget-oriented gender analysis of the economic stimulus packages. First, the measures will be categorised in accordance with budget-oriented criteria. This will make it possible to sort the great variety of measures in accordance with their budgetary aspects. Next, starting from this structure, we shall select a number of measures and subject them to a gender analysis. Gender analyses require, as already mentioned, the gathering of data with regard to the policy area in question. For this reason the chosen measures of the economic stimulus packages are assigned to policy areas and analysed in accordance with a presentation of gender relations in the area in question. Measures with significant social policy relevance will be considered from the standpoint of the care economy. In a third stage, the outcomes of the gender analysis will be re-integrated into the budget structure so that, besides their qualitative contribution to the development of equality, their weight in the economic stimulus packages as a whole will be discernible.

1. Systematisation of the Economic Stimulus Packages in accordance with Budget Criteria

The first and second economic stimulus packages will be examined together, since separating them provides no analytical added value. The full detail of the measures will be systematised by sorting them, in what follows, into the categories »direct expenditure«, »tax concessions« and »financial support« and in accordance with their target groups (see Appendix 1). Orientation in this respect is in accordance with where the costs arise for the Federal government: in other words, whether they represent the costs of funding for direct disbursement, costs due to the relinquishment of revenues or costs arising from the

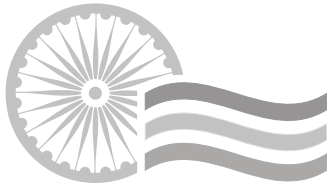
provision of financial support for third parties. Within these categories the parts of the budget are categorised in terms of their respective target groups: »citizens« as private persons, »public authorities« and the »private economy« (including citizens as employees).

Direct expenditure involves the outflow of public money to citizens, to public authorities and to the private economy for the purpose of reinforcing and promoting their respective roles in the national economy. This includes social transfers, direct subsidies and public investments. Increases in the personnel costs of government bodies for example, in order to increase public provision are understood as investment in the development of public goods, which involves direct expenditure. The public authorities provide primarily socially desirable services and are entrusted with the safeguarding of public goods, such as education, social peace and prosperity. Citizens are, on the one hand, consumers of private and public provisions and, on the other hand, in the private realm, producers of good and services, for example, as carers who ensure the basic functioning of society, including the economy. In this category also belongs non-market work carried out in the household and so provided without payment. The private economy produces goods and services for market exchange and creates prosperity by providing jobs and producing goods. Citizens in their role as employees are assigned to this realm.

Relief in the form of tax concessions represents revenue losses for the state. Their purpose is to give citizens and the private economy financial scope for consumption and investment by reducing taxes and contributions.

Financial support includes guarantees, as well as the making available or topping up of loan programmes. For practical reasons the financial support measures are not further differentiated into their component loans and grants, but generalised as loan and guarantee programmes. The aim of these measures is to enable their target groups to invest. Costs arise from loans and guarantees only if the principal debtor becomes insolvent.

³ For a first estimate of the overall burden on the public budget because of the economic stimulus packages, see Leifels et al. 2009.



In the case of credit programmes state agents incur indirect revenue losses with regard to self-financed loans in the form of opportunity costs due to the loss of interest at the market rate. Loans made available by the state represent a relinquishment of consumption on the part of the state by providing funds for third parties since it can no longer dispose of the funds as it wishes.

This rough categorisation of the measures of the economic stimulus packages makes it possible to conduct the first overview of the programmes and also to point to the significance of the various forms of investment. The categorisation of target groups makes clear to what degree and with what weighting the different areas of society »citizens in private households«, »the public authorities« and »the private economy« are receiving state support in the crisis. This enables us to place the individual measures examined in terms of their equality aspects back into the overall context of the economic stimulus packages and thus to evaluate equality outcomes.

The Economic Stimulus Packages

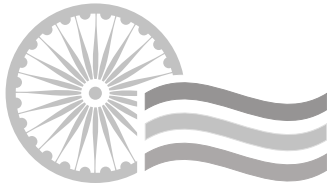
In response to the financial crisis and its effects both foreseeable and unforeseeable on the real economy Germany initiated the largest economic stimulus programme in its history, in the form of economic stimulus packages I and II. By means of a wide range of measures both private individuals and enterprises are to be given concessions with regard to taxes and social contributions, investment is to be boosted and financial support made available. The funds for this purpose were to be disbursed primarily in 2009 and 2010. According to a government statement (14 January 2009) the overall size of the programme represents over 3 per cent of GDP for these years: in other words, the value of all the paid labour (within the framework of the market as usually understood), goods produced and services provided in these two years. Notwithstanding the different views on the actions of the government an active economic stimulus policy was widely welcomed in the face of the crisis and its consequences. Criticism was directed at, among other things, the size of the programme given the according to initial estimates 7 per cent GDP loss; the failure to take the opportunity to pursue an

environmental policy turn in economic policy; and the short time horizon with regard to implementation of the measures. Critics also found fault with the lack of balance with regard to the support measures for the private economy, from which the service sector came away empty-handed, apart from banking and finance. As selection criterion the notion of »systemic importance« originally used to classify types of financial institution was extended to the areas granted support and used as a reason for denying other sectors measures to maintain jobs, orders and inventories.

This Expert Opinion is concerned with economic stimulus packages I and II. The package of measures of 7 October 2008 to »reduce the tax burden, stabilise social insurance contributions and invest in families« was adopted earlier and does not form part of these packages. The later Growth Acceleration Act (Wachstumsbeschleunigungsgesetz) of 22 December 2009 is not part of the set of measures to be examined here either.

Economic stimulus package I entitled »Securing Jobs by Reinforcing Growth« was passed on 5 November 2008. Within this framework were adopted, among other things, the Law on the Implementation of Tax Regulations in the Packages of Measures »Securing Jobs by Reinforcing Growth« of 21 December 2008, the Financial Market Stabilisation Act and the Financial Market Stabilisation Fund Act (both 17 October 2008), including the implementing provision (17 October 2008) and the Decree (20 October 2008). According to the websites of the Finance Ministry, the Ministry of the Economy and the Federal Government's Press and Information Office⁴ investments and placements of orders worth 50 billion euros and 20 billion euros, respectively, will be used to ensure the financing and liquidity of companies.

⁴ See: <http://www.bmwi.de/BMWi/Navigation/Wirtschaft/konjunktur.html>; http://www.bundesfinanzministerium.de/nrnn_55092/DE/Buergerinnen_und_Buerger/Gesellschaft_und_Zukunft/themenschwerpunkt_konjunkturpakete/node.html?_nnn=true; and <http://www.konjunkturpaket.de/Webs/KP/DE/Homepage/home.html>



Economic stimulus package II was passed as a »Pact for Employment and Stability« (14 January 2009). Within this framework the Law on Ensuring Employment and Stability in Germany (2 March 2009) and the directive on promoting the sales of private cars (20 February 2009 with amendments dated 17 March 2009 and 26 June 2009) were passed.⁵ Officially, around 50 billion euros were made available.

⁵ See:
<http://www.konjunkturpaket.de/Webs/KP/DE/GesetzeundVerordnungen/gesetz-und-verordnungen.html>

The packages include tax concessions for households and companies, the replenishment of investment programmes, the extension of labour market policy measures and the provision of funds for loan and financing programmes.

Analysis of the Overall Budget

Categories of Expenditure

The three groups »direct expenditure«, »tax concessions« and »financial support« total an estimated 187 billion euros. It should be kept in mind with regard to financial support that it is impossible to put a precise figure on it because it concerns loans and guarantees, and we will not consider the grant component of the credit programmes here. The planned debt brake »Sustainable Finance Policy for Future Generations« cannot be assigned to any of our three categories and at present its precise costs cannot be ascertained nor allocated (however, see the section on the care economy). The following figures are based on statements by the government, including the updated figures of ministries, experts' statements and the author's own calculations (see the table references in Appendix I).

The 15 measures involving direct expenditure (see Appendix I) account for around 23 per cent (43.5 billion euros) of the economic stimulus packages. The largest items are the future-oriented investment in the public sector (16 billion euros), the federal subsidy to the statutory health insurance schemes (9 billion euros) which eases the financial burden primarily on employees and employers, and thirdly the direct allocation to the environmental or scrappage premium

The six measures involving tax concessions, with an estimated revenue loss to the state of 18 billion euros, make up around 10 per cent of the packages. The biggest items here are changes in income tax provisions (around 9.4 billion euros) and the regressive tax write-offs on movable assets (estimated at 6.3 billion euros).

The financial support amounts to around 125 billion euros. This represents a nominal share of 67 per cent in the economic stimulus packages overall. With 75 billion euros allocated for guarantees and 40 billion euros for special credit programmes for SMEs (Mittelstand) and for larger enterprises, the main beneficiary is the economy: 93 per cent of the funds are allocated to them.

Target Groups

Assigning the funding of the economic stimulus packages to private persons or private households, the public authorities and private companies the following picture emerges:

The resources in the direct expenditure category which make up a quarter of the packages are allocated to private persons or households, the public authorities and the private economy. Around 17 per cent of the funds benefit individuals or households through the environmental premium and the transfer payments for children (child bonus, increase in the children's standard rate with regard to basic social protection). The private economy benefits from around 34 per cent of the funds, which are allocated to labour market policy related subsidies primarily for employers in respect of wage, training and continued employment or re-employment costs and the reduction or assumption of social insurance contributions.⁶ The public sector receives around 49 per cent of the money in the form of infrastructural investment and funds to increase or improve labour market policy provisions.⁷

⁶ In detail, subsidies for re-employment within the framework of the WeGebAU, the prolongation of compensation for reduced hours, subsidies for training, ESF money for employment protection, reimbursing the social contributions of those on reduced hours and the federal subsidy for statutory health insurance.

⁷ In detail, additional personnel and resources for the Federal Employment Agency and providers of basic social protection, the joint task concerning regional economic structures, investment in transport and future-oriented investment in the public

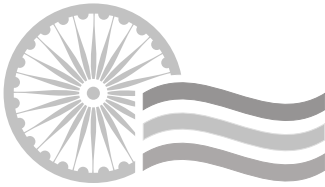


Figure 1: Distribution of economic stimulus package funds by expenditure

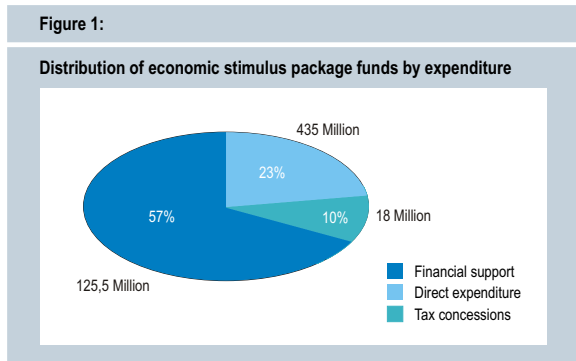
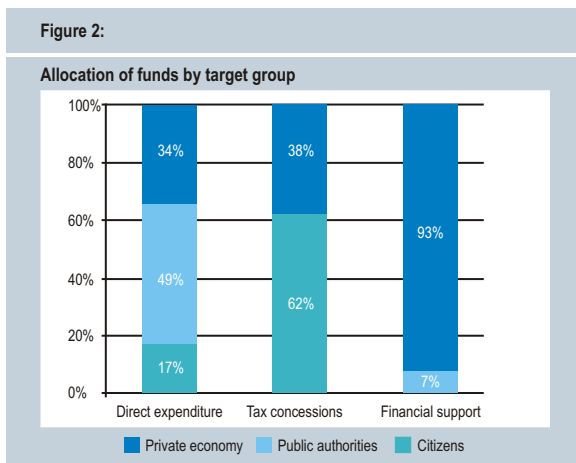


Figure 2: Allocation of funds by target group



Relatively speaking, private persons receive most support from the smallest package of measures, tax concessions. They benefit from around 62 per cent of the planned relinquishment of state revenues. The income tax reductions and the changes in car tax, as well as the deductibility of trade services are aimed principally at relieving the burden on private households. Around 38 per cent of this relief comprises new regulations on tax write-offs which benefit enterprises.

The economy is receiving the most help by means of the most extensive package of measures, namely financial support: 93 per cent of funds are reserved for private sector companies. Around 7 per cent of funding benefits public and non-profit-making investors, and to only an insignificant extent private investors, in programmes for energy-related building refurbishment and KfW (KfW

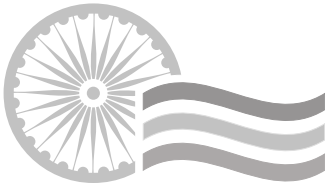
banking group is a German government-owned development bank: the name comes from Kreditanstalt für Wiederaufbau, meaning Reconstruction Credit Institute) programmes for municipalities.

⁸ Since the sureties for export guarantees are not estimated precisely they cannot be taken into account here.

2. Gender Analysis of Individual Measures

In what follows individual measures will be selected for closer examination and analysed. The first step in the selection of measures is to check their gender relevance (see Guidance on §2 GGO), which involves asking whether people that is, men and women are directly affected as a target group or whether people are indirectly affected by the consequences of a measure, for example, in respect of support provided for institutions in which men and women work. Since most of the interventions of the economic stimulus packages serve to preserve jobs, comprise funding for private persons and are targeted on the economic activity of enterprises in which people work it is not surprising that the measures have marked relevance for equality. Even the financing support which is less accessible due to the eligibility conditions and complexity of the financial system has indirect relevance for equality since it supports in the first instance corporate actors, such as non-profit-making organisations, enterprises and municipalities in which both men and women work or whose products benefit men and women. The investments carried out with financial support have employment effects and change people's working and living environments, in accordance with the context. Apart from the special depreciation allowances for small and medium-sized companies, as well as the regressive tax write-offs for movable goods the measures of the economic stimulus packages are therefore relevant, either directly or indirectly, to the development of equality in Germany.

The first more specific selection criterion is the relative transparency of the measure; in other words, whether detailed information is easily accessible on the contents of the planned programme and whether the thematic area is readily susceptible to analysis. Secondly, the availability of gender-specific data in the relevant policy area plays a role. Thirdly, the volume of funding involved



in a measure is considered. Since the employment effects for men and women have been evaluated within the framework of a gender analysis of the economic stimulus packages by the Hans-Böckler-Stiftung (Schambach 2010), their evaluation will not be the main concern here. The abovementioned selection criteria also influence the focus, namely whether a measure will be assessed from the standpoint of its target groups (the direct recipients of funding) or from the standpoint of the target group at whose support the measure is aimed.

Starting out with a budget-oriented classification the following measures will be examined in more detail:

all tax concessions relevant to equality (deductibility of trade services, changes in car tax, new income tax regulations);

with regard to direct expenditure:

- all those which benefit private citizens (child bonus, increase in Hartz IV standard rates for children, environmental/scrappage premiums);
- out of the measures which benefit the private economy those related to short-time working compensation and, because of its size, the federal subsidy for statutory health insurance;
- out of the measures which affect the public sector because of the size of the measure »Future-oriented investment in the public sector«;

With regard to financial support:

- the funds administered in the so-called »Germany fund« for the credit programme for SMEs and for larger companies, as well as for federal government guarantees and municipal investments (although exclusively in respect of equality with regard to access to the resources of power and money);
- the government's broadband strategy.

The measures to promote investment and financial support are not examined individually with the exception of the broadband strategy because, on the one hand, their access and grant conditions are

heterogeneous and complex, and on the other hand, for an evaluation from an equality standpoint more data are needed on the concrete allocation arrangements and the actual use by different economic branches. The examination of financial support from an equality standpoint will here be confined to an evaluation of allocation procedures.

The selection indicates that the problem that arises with regard to gender budgeting due to practicability requirements applies also to this Expert Opinion (see Frey 2008): the investment measures in infrastructure and institutions and the financial and credit instruments remain neglected and difficulties are generated, thereby favouring concentration on measures for private persons. The structure and implementation of analyses, however, make omissions transparent and so point to the need for further analysis and evaluation.

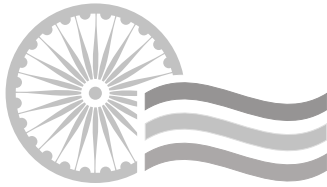
The following analyses of measures are structured in accordance with policy areas, based on the methodological requirement of gender analyses to start from the current state of gender relations.

Transport: Direct Subsidies and Tax Concessions for Male Groups among Transport Users

Environmental premium

The impetus towards the largest personal consumer subsidy ever provided in Germany was given by the car industry with the support of IG Metall. On 20 February 2009 the »Directive on measures to boost car sales« was issued in which the details of the »environmental premium« which has become known as the »scrappage premium« were laid down. While in the Directive itself the modernisation of the vehicle stock in Germany was emphasised as the aim of the support, politicians made no bones about the fact that it was aimed at boosting the sales of German carmakers in order to preserve jobs.

The premium is available to anyone who has a car scrapped which is nine years old or more, and which they have owned for at least 12 months, and buys a new one in its place. The scrappage premium was originally estimated at 1.5 billion euros and time limited to the period up to 31 May 2009. Due to the unexpected surge in demand, however, it was extended to 31 December



2009 and the sum allocated raised to 5 billion euros. As a result, the cost of this instrument⁹ is approaching the overall annual cost of the item »Family« in the Federal Budget 2007 before the introduction of parental allowances (5.26 billion euros).

⁹ The estimated 1014 million euros in additional administrative costs arising from the processing of applications for the premium are included in the 5 billion euros.

The »grand coalition« could have learned about administrative reasons for seeking to influence car sales for example, preventing misuse from France and Italy. These countries have substantial experience of new purchase premiums. The regulations in other countries have included conditions encouraging the purchase of more economical cars and making possible the subsidised exchange of motorised two-wheel vehicles for bicycles.

The sole environmental policy provision in Germany was that new cars had to meet exhaust standard category 4. However, since 1 September 2009 the stricter category 5 standard has been in place as a European norm. It is undoubtedly also for that reason that expert assessments have described the premium as devoid of any environmental policy provisions (IFEU 2009; VCD 2009). In other words, the German government narrowed its own environmental policy room to manoeuvre.

In what follows, the environmental premium will be considered solely with regard to the target group of car owners as a subgroup of transport users.¹⁰ We shall examine whether the environmental premium was a balanced measure in the sense that it both potentially and actually benefited men and women equally. Around 36 per cent of transport users primarily use a car. Around one-fifth (19 per cent) rarely use local public transport and are counted as potential users. Around 34 per cent travel more frequently with public transport: a little more than half of those are regular users. A further 11 per cent travel either by bicycle or on foot (MiD 2008 with reference to MiD 2002) (see Figure 3). Women are in the group of those who are dependent on public transport because they do not have a driving license or do not have a car: in fact, they make up 72 per cent of them. This concerns around 8 per cent of all transport users.

¹⁰ For a labour market policy evaluation using equal opportunities criteria see Schambach 2009; for a first environmental policy assessment see IFEU 2009

In other words, the large number of transport users for whom the car does not play a central role did not receive anything towards their mobility by way of the environmental premium. The environmental premium was only relevant for private persons who owned an (old) car. Approximately half the population owns a car, twice as many men as women: 16 per cent of women and 34 per cent of men in the population as a whole, whose composition is 51 per cent women and 49 per cent men (see Figure 4).

Figure 3:

Utilisation of principal means of transport

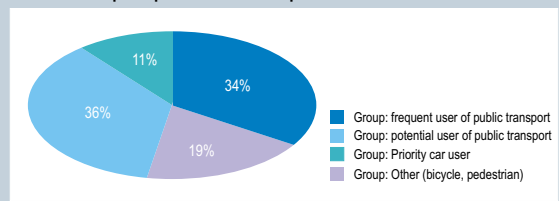
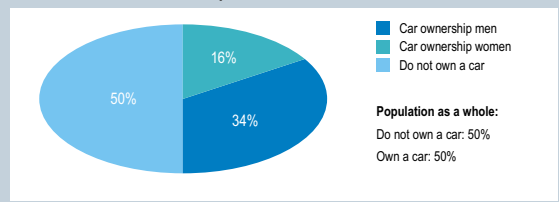
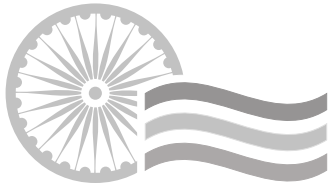


Figure 4:

Distribution of car ownership



When the environmental premium was introduced just over 21 per cent of the population as a whole owned a car old enough to qualify for subsidised exchange (author's calculations on the basis of IFEU 2009; KBA [Kraftfahrtbundesamt or Federal Motor Vehicle Office] for the number of cars; DESTATIS [Federal Statistical Office] 2010 on the population). It cannot be elicited from the statistical data whether women or men drive older cars or tend to keep their cars longer (MiD 2008). Within the group of those entitled to apply for the premium it must therefore be assumed that men and women were represented in accordance with their respective representation among car owners and thus that women, who make up just over a third, were a minority in this target group. In other words, the environmental premium was directed towards a target group of transport users primarily comprising men, and therefore could not possibly have benefited women and men equally.



However, it should not be assumed that the design of the environmental premium reinforced imbalances in gender relations within the target group of car drivers. This can be estimated on the basis of the car purchases subsidised by the environmental premium. Data from 2003 confirm the stereotype that women tend to drive cars with lower horsepower and smaller engines (MiD 2002: 18). More recent research also shows that women prefer smaller cars and do not put the same value on larger engines (Kortus-Schultes and Moos 2006). In addition, fewer women than men drive cars with diesel engines. However, it should be taken into consideration that in recent years the purchasing behaviour of men and women appears to have become increasingly similar and that while for men environmental considerations are becoming more important in their purchasing decisions, for women they are becoming less important (Aral 2007). If this continues differences with regard to preferences will increasingly level off. It cannot be established unequivocally from the available data on the environmental premium which classes of car were driven by women and which by men, so that the following considerations are based on assumptions of plausibility.

The growth in new car registrations was greatest in the car classes »small car« (for example, VW Polo), »compact car« (for example, VW Golf) and so-called »minis« (for example, Fiat Panda, Smart). A total of 84 per cent of all environmental premiums were issued for cars in these classes. Mid-range and top-of-the-range cars, as well as sports cars, experienced no sales increases in comparison to the same period in the previous year (January to July 2008 or 2009 IFEU 2009: 5) New vehicles tended to be in smaller classes of vehicle than the cars which were scrapped (IFEU 2009: 8). The premium was used to cofinance only 10 per cent of diesel cars.

That means that the premium was used to modernise those kinds of car with regard to which women are relatively well represented. The extent to which women in fact took up the premium in greater proportion than men cannot be determined conclusively.

Needless to say, the mere fact that someone owns a car says nothing about the use they put it to. In order to

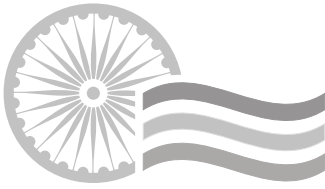
assess the use made of the environmental premium by men and women, as well as the hidden care economy (see section on the care economy) we need to take another look at how cars are used.

Analyses by the German Mobility Panel show that even when women have access to a car in the household they use local public transport more often than men: for example, 26 per cent of women use public transport to get to work, while only 13 per cent of men do so. Apart from that, they use cars for both job-related and non-job-related journeys much less often than men. Furthermore, if there is only one car in the household men have priority. The under-representation of women in the group of car owners is reinforced by actual automobile use.

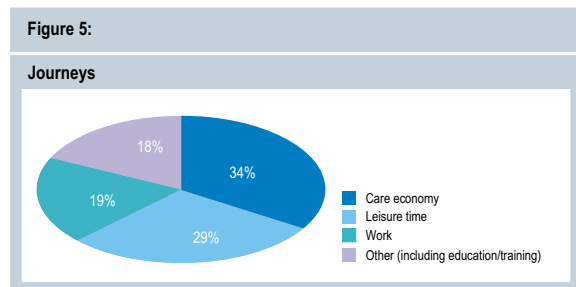
Households with children in particular have cars. Non-work-related journeys that women make tend to be related to the children in the household: mothers use the car for picking them up or dropping them off. This accounts for a large proportion of journeys. In contrast to the general view, most trips, regardless of the specific means of transport, are not for the purpose of work. It is work in the care economy that requires mobility the most. Over one-third of all trips (34 per cent) are due to a need to provide care or accompany someone somewhere, and only 19 per cent are due to work (Friedrich 2006). In other words, the proportion of journeys connected to earning a living is much smaller than that of journeys made during leisure time (29 per cent). The rest are accounted for by other journeys, for example, related to education,

The growth in the number of compact cars purchased could indicate that families have taken advantage of the premium. In that case, within the framework of the unequal gender distribution of car use car driving mothers would have benefited from the environmental premium.

The decision to select a crisis instrument which provides a boost to the motor vehicle industry need not have been problematic from the standpoint of potential user groups. However, the choice of promoting cars exclusively is unfair in terms of equality. Far more men than women have a car; women use public transport more than men and are much more dependent on it.



The exclusion of non-private vehicles for example, public transport fleets means that support is reserved for the most male-dominated group among transport users. Subsidisation of the public transport fleet would not have been inconsistent with either the economic objective of boosting the domestic motor vehicle industry or environmental policy objectives. A further premium for exchanging a motor vehicle for a bicycle would not have determined the target group so one-sidedly.



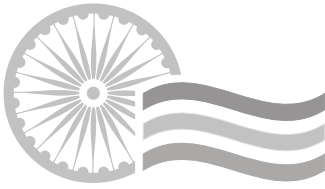
There is also the fact that in the crisis the use of public transport and bicycles as opposed to cars becomes more important and goes against the general downward trend. For example, public transport experienced just over 9 per cent growth (Federal Statistical Office 2009). Taking into account the consumption and modernisation needs of local public transport and unmotorised transport within the framework of the large financial subsidies in the crisis would have been both fairer from a gender standpoint and consistent with the environmental policy aims of changed mobility needs in the crisis. It is therefore easy to show that a gender-sensitive design would not only have been in line with policy goals but would also have helped to reinforce positive environmental trends. With the exclusion of these vehicles and the limiting of support to cars the environmental premium resulted in a bias towards predominantly male car users.

From a budgetary standpoint it is important to emphasise that by far the largest direct expenditure which benefited private persons directly envisaged only half the population as target group since the other half do not count among car owners. The choice of target group meant that the funds could benefit at most only one-third of women, namely those who took advantage of the environmental premium in accordance with their proportion of car owners. A gender analytical look at

Changes and Waivers with regard to Car Taxes

A restructuring of car taxes was also announced within the framework of the economic stimulus packages. The new regulations are intended to provide environmentally-friendly incentives and are oriented towards pollution due to car use. A linear rate applies oriented towards CO₂ emissions with a free emission threshold and a basic allowance as minimum rate. Taking into account CO₂ emissions per kilometre and not only engine size is an environmental policy novelty. Particularly efficient clean-air cars which emit below 95 grammes of carbon dioxide per kilometre will from 2014 be taxed only on their cubic capacity. Overall, this is a positive development for car owners with clean-air cars with small engines. In this way, politically desirable changes in the purchasing behaviour of women, who have hitherto tended to purchase smaller, more economical cars, will be reinforced. It remains to be seen whether this will be sufficient incentive to bring about a convergence of men's car purchasing habits with those of women, who previously tended to take environmental concerns into consideration, and at the same time to curb the convergence of women towards the hitherto less environmentally oriented purchasing behaviour of men. The restructuring of car taxes shows that in this case with regard to environmental policy the design of the measures affects men and women differently in their respective roles (in this case as car purchasers), even if they are formulated gender neutrally. In terms of equality policy the measure can be evaluated positively because the underrepresentation of women in the target group of car drivers is offset by the relatively greater relief for women, mediated by their tendency to behave in a more environmentally friendly manner.

In order to provide an incentive to buy a car before the coming into force of the new car tax regulations a car tax exemption was included in the first economic stimulus package as an interim arrangement. This meant that newly registered between 5 November 2008 and 30 June 2009 cars were exempt from car tax for one or two years. Later registrations would be subject to the new car tax regulation. For cars meeting Euro standards 5 and 6 car tax was deferred for two years, up to the end of 2010 at the latest. For already registered cars meeting exhaust emission standard 5 a one-year exemption



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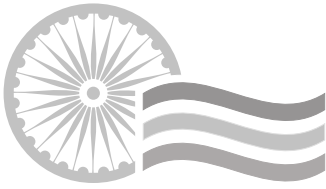
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could be applied for from 1 January 2009. Benefiting most from the tax exemption were those who saved the most on car tax, namely those with big cars. It is therefore reasonable to assume that, in relative terms, the group of male car owners saved the most in taxes. The relief effect arising from the estimated 500 million euros in relinquished tax revenues, therefore, did not benefit female car owners in proportion to their 30 per cent share of all car owners. Due to the design of the measure the quantitative relief effect for women as a group was lower than 30 per cent of total tax relief. The female minority in the target group has not benefited from the tax saving in accordance with their proportion of it but relatively less. This measure must therefore be evaluated as negative.

Labour Market: Blind in One Eye? Crisis Subsidy for »Regular« Jobs, But »Atypical Employment« Left at the Mercy of the Market

The labour market policy measures we shall consider come under the heading of direct expenditure in relation to short-time working: the prolongation of compensation payments for short-time working, subsidies for training and employment protection for those working short-time, topping up of ESF funding for employment protection during short-time working and the reimbursement of social insurance contributions. We shall not look at increases in the WeGebAU programme, personnel and funding in employment agencies and joint work associations (ARGE).

The aim of the labour market policy measures was to prevent redundancies and to promote training and education, with a view to improving employment opportunities in the crisis in preparation for the next economic upturn (»Bridging the Gap until the Next Upturn«, BMWi). Within the framework of the economic stimulus packages the time limit on drawing compensation for short-time working was prolonged from 12 months to 24 months. The policy goal of making it more attractive to undergo training or education during periods of short-time working was implemented in the second economic stimulus package. During periods of employee training/education the Federal Employment Agency in the first six months assumes full responsibility for social insurance contributions which during short-time working are otherwise borne by the



employer. If the employee does not engage in training/education the Agency pays half their social insurance contributions to begin with, rising to the full amount after the seventh month. Application was simplified by, among other things, relaxing the obligation to prove the need for short-time working. In this way service-providing companies obtained better access to these benefits. Coverage by the regulations on compensation for short-time working was extended to temporary workers and those on fixed-term contracts and the prospect of a minimum wage for temporary work was raised.

Prolongation of Compensation for Short-time Working

The regulation on compensation for short-time working was used primarily in manufacturing industry and by men. With almost 17 per cent of its employees affected by short-time working as a result of the economic crisis (in accordance with §170 SGB III) manufacturing industry accounted for by far the largest share of recipients. This compares to the average for the economy as a whole of 5 per cent. In June 2009, 78 per cent of persons working short-time were male, in comparison to 22 per cent female. This accounted for 7 per cent of all employed men for whom social insurance contributions are mandatory, but less than 3 per cent of women in the same category (Federal Employment Agency October 2009). In order to carry out an equality policy evaluation of compensation for short-time working and the training/education incentives also for temporary workers we need to look at gender relations in the labour market. The German labour market is markedly gender-segregated by international comparison (for details see Achatz et al. 2010). The labour market is structured vertically by gender so that one finds fewer women the higher one goes up the hierarchy in companies and branch representative bodies. It is also structured horizontally by gender in the sense that men and women are concentrated in different branches and activities.

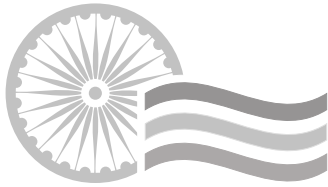
The labour market is also segregated in terms of types of contract: women are engaged in atypical employment to a much greater extent than men (for details, see Fuchs 2010). In so-called »regular employment« gender relations are dominated by men,

whose share of such employment is 63 per cent in comparison to women's 37 per cent. While half of all working women are in atypical employment only one-fifth of male employment is atypical. Overall, around 37 per cent in other words, more than one-third of all employment is not »regular« (Böckler 2009). Most forms of atypical employment affect predominantly women, the highest proportions of women being found in part-time work (84 per cent female) and mini/midi jobs (up to 75 per cent female). Women are also disproportionately represented in fixed-term employment (Giesecke and Wotschak 2009). Only temporary work, which is the least typical of atypical employment forms and, accounting for around 2 per cent of such employment, fairly insignificant, is dominated by men, at 73 per cent. Atypical jobs are paid below average and employment conditions are poor (for details, see Fuchs 2010b), sometimes precarious, without prospects and subject to considerable risk of unemployment. Atypical employment frequently means that it is impossible to obtain a wage sufficient to raise the recipient out of poverty and entails lower or no entitlement to social security¹¹ in the case of unemployment and old age (in particular, mini-jobs and part-time working), not to mention poor access to promotion and qualifications. This structurally disadvantageous positioning on the labour market also shows up in connection with the economic stimulus packages since the key measure with regard to employment protection during the crisis clearly does not affect typical female employment, since women benefit little from compensation for short-time working.

¹¹ The net wage principle for calculating entitlements is discriminatory in its effects because in tax category V assessed spouses mainly wives transfer their entitlements to higher earning husbands.

Does Compensation for Short-time Working Indicate How Much Someone Has Been Affected by the Crisis?

The fact that primarily men in certain branches of industry are affected by short-time working and that women's unemployment also appears to be diminishing in the crisis lead to the assumption that women are the »winners« of the crisis (cf. Schambach 2010). Women and female-dominated branches do not claim any crisis support and therefore their jobs and their branches are crisis-proof this is a false conclusion. Women are not to



be deemed the winners of the crisis because they do not take advantage of any crisis support measures. Rather the measures for safeguarding employment in the crisis do not affect women and typical female employment, being aimed at core employees with »regular« jobs. Those in atypical employment are »marginal« employees who, based on the legal terms of employment contracts, are the first to be made redundant or in the case of fixed-term working do not have their employment extended. Generally speaking, even companies' in-house crisis measures offer primarily qualified men employment protection (Giesecke and Wotschak 2009). Furthermore, in female-dominated branches, such as health care and social services, there was little short-time working. However, although not even one-quarter of employees for whom social insurance contributions are mandatory are men, well over half of recipients of compensation for short-time working were men (Federal Employment Agency, October 2009, p. 14). Since there are no crisis measures for typical women's employment the extent to which people have been affected by the crisis cannot be determined on the basis of women's take-up of existing measures. The take-up of compensation for short-time working is not a sufficient indicator for evaluating how much people have been affected by the crisis.

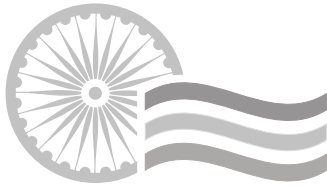
Furthermore, the »job miracle« with regard to the employment of women is not owing to an increase in the amount of work, but to a redistribution of the declining volume of work among more people, made possible by the liberalisation of the labour market. The increase in women in employment is an increase in the atypical, sometimes precarious employment of women. It would perhaps be too cynical to debate the extent to which this can be described as »winning«, given the conditions applying to someone in a »regular job« threatened with redundancy who, besides receiving unemployment benefit paid out at a level sufficient to maintain their standard of living for 12 months, may also receive depending on the company help to make the transition to a new job or early retirement. Women's fundamentally poorer employment conditions must be taken into account in their evaluation as »winners«, however. While in branches covered by a collective agreement the costs of the crisis were borne jointly and with social security benefits those working in deregulated employment have to pay for the effects of

the crisis individually in the form of unemployment or deteriorating working conditions.

One-Sided Distribution of Costs and Utilisation of Crisis Measures

Extension of the coverage of compensation for short-time working to temporary and fixed-term workers is to be welcomed. Having said that, looking at it in terms of gender it becomes clear that the main beneficiary of this extension is the kind of atypical employment which, on the one hand, is numerically small and also the sole male-dominated variety, as well as the one that is most balanced from a gender standpoint. Quantitatively more significant forms of atypical employment in which women are strongly represented remain without support measures for safeguarding jobs or for improving access to employment through the acquisition of qualifications. Compensation for short-time working, which primarily protects male employment against the effects of the crisis, however, is funded by all those who pay unemployment insurance contributions. This further emphasises how much the use of unemployment insurance resources is slanted in favour of men. This is the case because women are, in various ways, discriminated against in both job placement and in the provision of support, for example, by means of integration measures. Thus, integration subsidies are granted to women only half as often as to men (Böckler IM 2009). Not to put too fine a point on it, while in the crisis women in jobs for which social insurance contributions are mandatory co-finance the preservation of »regular« jobs paid well enough to ensure a decent living for men in branches and workplaces benefiting from collective agreements, decently paid women's jobs and unprotected typical female employment are left to the mercy of the market. Women's lower unemployment insurance contributions should be set against their lower entitlements and poorer support from the Federal Employment Agency, not to mention the much lower benefit take-up rate. This discrepancy between women and men as beneficiaries of state labour market policy is heightened by the measures which concentrate on male jobs and employment, cushioning the impact of the crisis for them.

A further structural disadvantage suffered by certain



groups of women with regard to compensation for short-time working arises from the method of calculation, which relies on net income. The amount of compensation for short-time working diminishes significantly for those in tax category V which is what wives tend to be in in comparison to other tax categories (see footnote 11). This is not balanced out by the benefits of pooling household income and represents direct discrimination, since it systematically affects women above all. The assessment of compensation for short-time working, therefore, given that its effects are limited to typically male employment and a supplementary measure directed towards typically female employment is lacking, must therefore be negative.

Reimbursement of Social Security Contributions and Training/Education during Periods of Short-time Working

To provide some relief to employers it was decided that the Federal Employment Agency would be responsible for half their social security contributions for employees on short-time working. For employees in this situation involved in training/education, however, the Agency would assume payment of contributions in full. The assumption of social security contributions represents, since they were linked to short-time working, relief primarily for male employment. Incidental wage costs not subsidised by compensation for short-time working were not reduced.

The regulation on taking over employers' contributions for employees engaged in training/education established an incentive to use short-time working for training purposes. A subsequent amendment means that now social security contributions are reimbursed in full unconditionally from the seventh month. This considerably reduces the incentive for the employer to instigate training/education: while in the first months an incentive is provided by the assumption of the employer's full contribution rather than only half if an employee in short-time working is engaged in training/education, now after the seventh month this is no longer a factor. For those in atypical employment there is little incentive in any case since their access to training/education is systematically blocked. Investment in peripheral employees does not benefit

companies economically at all. On an individual basis, they work fewer hours or belong to that part of the workforce used as a »buffer« for periods when business is booming and therefore dispensable when the situation takes a turn for the worse. As a result, this in any case weakly constructed measure aimed at boosting employment opportunities in the crisis via training/education completely neglects this group.

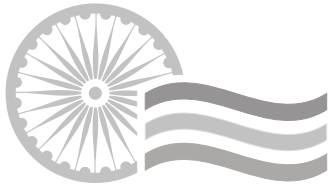
Extra subsidies from the Federal Employment Agency were scheduled for temporary workers in order to increase their chances of re-employment. Here again the sole male group of atypical employees was chosen, while no targeted efforts were made for the numerically much larger group of atypical employees. No relief was planned via the assumption of social security contributions, not to mention an incentive for training/education, for typically female employment. From an equal opportunities perspective this is negative.

Announcement of a Minimum Wage for Temporary Employees

The economic stimulus packages also contained an announcement of a minimum wage for temporary employees. Even though this obviously takes nothing from the funding of the economic stimulus programme it should be pointed out here that it does present a difficulty from an equality standpoint. It brings into focus the central and urgent issue of wage discrimination on the part of the state, namely because of discrimination against men. Having said that, for decades now Germany has not budged from its position as the EU's worst offender when it comes to wage discrimination against women, at 23 per cent on average, and that applies to a comparison of the gross hourly wage, not just to total wages, for example (for details, see Ziegler et al. 2010). The urgency of labour market policy measures can be measured gender-neutrally by both the extent of discrimination and the size of the affected group.

Summary: Old Patterns Holding Back Change and Development

If Germany is to emerge stronger from the crisis the branches which have withstood the turbulence (cf. IAB 2009) should also receive at least equal support in order



to ensure that in future the focus is not in the wrong place. The impression arises that the market adjustment accelerated by the crisis is leading to a new wave of subsidies for branches which, although threatened by structural change and shifts in demand, are also effective lobbyists. While female dominated branches such as retail have suffered enormous job losses, in male dominated branches jobs have been propped up with massive subsidies.¹² The final example is the environmental or scrappage premium as a sales subsidy for the auto industry worth 5 billion euros. Female-dominated branches in which the labour requirements will increase significantly in future, thus promising much from a labour market policy standpoint, are at present not even receiving investment commensurate with existing needs. Instead of reducing the difficulties currently being experienced in filling vacancies by improving the quality of employment (cf. IAB 2009; ver.di 2009), besides chronic underfunding, further deregulation is taking place. The branches affected include traditional areas of the »care economy« such as health care, nursing, other kinds of care and social services.

¹²A budget-oriented analysis of the financial flows in the various branches and an assessment of their respective outcomes for the benefit of society, taking into account their longer term contribution to reducing unemployment, would make it possible to put a precise figure on the effects of the economic stimulus packages in terms of structural preservation or the prevention of structural change. However, this cannot be provided here.

The concentration in the economic stimulus packages on safeguarding characteristically male full-time employment and male-dominated branches, together with the neglect of women's incomes illustrates that at least in terms of its effects the state, when swift action is called for, tends to fall back on the antiquated West German model of the male breadwinner and the low-earning and economically dependent wife. Similar to other forms of state regulation characteristic of Germany such as joint spousal tax declarations in evidence here are institutionalised ideas, immobilised in the law, concerning gender, gender roles and gender relations. If society's development potential is to be harnessed productively, however, there must be recognition of both changed social realities and also changing views on the work-life balance on the part of men. Studies show that in many cases the traditional model no longer applies and that, increasingly, women are the family breadwinners (Böcklerimpuls 2009) and

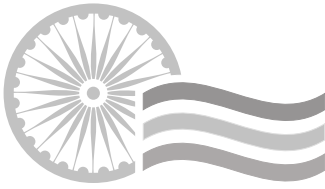
that many men do not want to be weighed down with full-time employment (DIW 2007). They would like to work less, even to obtain an equal »right to care« (for example, for their children and parents). With regard to equality in the labour market it is no longer only a question of the right of women to the same quality of employment conditions and the ability to secure an independent livelihood through work or of state neutrality with regard to institutional arrangements affecting dependency, such as marriages based on a sole earner and a housewife. Also at issue is equal rights for men in all phases of the life course and in all areas of life, including those traditionally with female connotations. The one-sided state protection of »regular jobs« in its present form denies both women and men their attested equal rights.

Taxation: Positive and Negative Arrangements with regard to Equality

Changes in Income Tax

Among the changes to income tax the tax-free allowance was raised by 170 euros from 2010, backdated to 2009. This means that from 2010 income tax will have to be paid only starting from 8,005 euros for single persons. Married people who make joint tax declarations pay only from a taxable total household income of 16,010 euros. Based on joint spousal declarations this applies also to marriages in which only one person has a taxable income and pays tax alone. In addition, tax brackets overall have been shifted to the right by 730 euros. As a further measure the starting rate was reduced from 15 per cent to 14 per cent. In what follows we shall examine primarily the lowering of the starting rate and the raising of tax-free allowances.

The main beneficiaries from the changes will be tax payers with low incomes. However, it is important to note that those whose taxable income is below 8,005 euros a year or who receive tax-free income, such as basic social assistance, pay no tax and therefore do not benefit from either the raising of the personal allowance or the lowering of the starting rate. Other income groups that do not benefit from the changes include those with so-called mini- or midi-jobs which pay a pittance, since they are generally taxed at a flat rate. The number of jobs which do not provide a living wage have increased significantly as a result of the labour market reforms. In



other words, the female-dominated group of the lowest earners, who pay no income tax, receive no relief from the changes in tax law. As a result of deregulation in the low pay sphere, however, this group, like all atypical employees, bears the highest risks and has been affected first and particularly hard by the crisis (cf. Giesecke/Wotschak 2009). Nevertheless, no explicit account is taken of them in the measures of the economic stimulus packages.

At 76 per cent, women are clearly overrepresented among the two-thirds of part-time employees for whom that is their sole employment. Only 45 per cent of women employed exclusively part-time are also maintained by relatives. Here working husbands benefit from the income tax decreases as a result of joint spousal tax declarations since pooling reduces their tax liability. This subsidisation of »housewife or supplementary earner« marriages, however, for various reasons benefits only western German men since joint spousal tax declaration reduces (see Spangenberg 2005: 22) the tax liability of western German households to 93 per cent, amounting to almost 20 billion euros (Stand 2005).¹³

¹³ See also the sections on the Germany Fund and the scope of eastern German exclusion.

As a result of the changes in tax-free allowances more people have been rendered exempt from tax with low tax-liable earnings up to the new personal allowance: the lowering of the starting rate means that the tax burden is lowered from the first euro of taxable income. Data on the level of taxable income broken down by gender are not available. Various reasons lead one to assume, however, that the proportion of women among tax-liable low earners is particularly high. This is because, on the one hand, Germany has one of the highest levels of wage discrimination between men and women in Europe, regardless of branch or working time: it amounts to 23 per cent, on average. Furthermore, most part-time workers are women. The German tax system, via joint spousal tax declarations, encourages the take-up of part-time and marginal employment by one of the partners. Given the different chances of earning a decent wage due to wage discrimination such employment tends to be taken up by women. The distribution of men and women by income tax bracket shows that married women, as a rule, fall in tax bracket

V, which caters for the lower incomes of married persons (Spangenberg 2007).

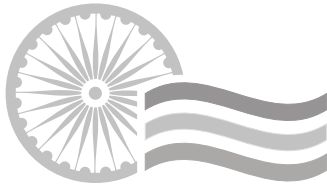
It is a fundamental problem that wives filing a joint tax return who have taxable income and who earn less than their husband do not benefit from the new tax advantages (cf. Spangenberg 2005: 23ff). As a result of taking over part of the husband's income for calculation purposes the wife's income is notionally raised to make up »her half« of the joint tax liability and thus subject to higher tax deductions. In this way for the purpose of calculating household tax liability she has a disproportionately high tax burden, given her income. However, it is the husband that receives the higher tax rebates arising from the joint spousal tax declaration, not least because of the antiquated guidelines governing tax declarations. The extent to which the increased financial scope made available to a household by the income tax changes in fact benefits the lower earning partner depends on the distribution of power within the marriage with regard to how the tax rebates may be used (see Spangenberg 2007).

Any evaluation of the measures must take into account that the changes in income tax law benefit all taxpayers. The reduction in the starting rate means that all taxpayers pay 1 per cent less tax. In other words, even high earners pay less tax.

Although the changes do not provide the lowest earners with any tax relief and discriminatory tax law structures »take back« part of the relief for western German low earning women subject to joint spousal tax declaration, nevertheless the changes are to be evaluated as positive from an equality standpoint. The reforms render a segment of low earners in which, for structural reasons, women are particularly strongly represented completely free of tax and give relief to a further segment of low earners not grouped in tax bracket V, due to the lowering of the tax burden. In comparison to the lowering of the top rate of income tax women, because they make up a large proportion of low earners, benefit from the raising of the tax-free allowance and the reduction in the starting rate.

Tax Deductibility of Trade Services

The tax deductibility of trade services (Handwerkerleistungen)¹⁴ is related to maintenance



and modernisation measures. The tax bonus was doubled for two years to 20 per cent of a maximum 6,000 euros. Thus the amount expended on trade services reduces the amount of tax to be paid. This means that all taxpayers are equally exempt from tax (up to 1,200 euros) on sums paid out for trade services. This differs from counting on the basis of the tax base under which higher incomes would benefit more, relatively speaking, due to tax progression. The Federal Ministry of the Economy and Technology hopes that household relief will amount to 1.5 billion euros¹⁴ a year and that the trade sector will experience economic growth of 2 per cent, corresponding to an increase in turnover of 10 billion euros.

¹⁴ At this point it is worth mentioning briefly that the tax deductibility of household-related services is not found in economic stimulus packages I and II. Instead, it is contained in the »Package of measures to reduce the tax burden, stabilise social security contributions and invest in families« of 7 October 2008. We shall therefore not consider it here.

¹⁵ In line with other calculations in this Expert Opinion relief of only 900 million euros will be assumed.

The expected effect is that the demand of private households for trade services will be maintained even in the crisis; in other words, jobs will be commissioned or not postponed. This is the only measure within the framework of the economic stimulus packages which is not only time limited, but in respect of which an evaluation is planned when it expires. Within this framework there should be an evaluation of its equality policy effects, for example, with the Federal Government guidance on gender-differentiated impact assessment (guidance on §2 GGO).

The evaluation of the measure should take into account not only the sector supported but also the potential scope of trade services that could be subject to relief. It is striking that by reducing trade services to maintenance and modernisation measures only a small subset of the trade services were selected that households tend to do without during crisis periods. Trades which potentially would be particularly hard hit by the crisis would be disregarded if the evaluation was limited to the sector given support.

The equality policy evaluation begins with a presentation of the gender segregation of crafts, with a view to evaluating the selection of trade services that are to receive support in the crisis. We shall not look at

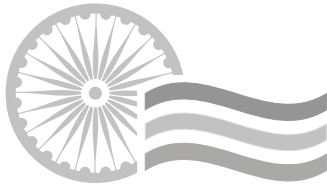
the relief enjoyed by taxpaying men and women. It may be assumed that trade services benefit all people equally in a given household.

One-third of all tradespeople are women; just under one-fifth (19 per cent) of trade businesses are headed by women. The vast majority of female tradespeople work in commercial trades, for example, as specialised shop assistants. In the commercial/technical sector only 17 per cent are women. The trades which belong here and which might receive support under the measure include construction and finishing, electrical and metal working, and woodworking. Very few women train to do these occupations; they make up less than one-tenth of trainees. The commercial/technical trades, in which women are better represented, include personal care, health care and clothing, with such occupations as hairdresser, dressmaker, optician and dental technician. However, none of these received crisis-related support.

To summarise, due to the design of the measures only those trade enterprises can benefit in which almost exclusively men are to be found. Traditionally female trade services are not included in those provided with tax concessions during crisis periods. The expected increases in turnover will therefore fall primarily to men or men's businesses. This means that the crisis support given by the state for trades to make their services more attractive will go to men, while women in trades will be left to weather the crisis on their own. The measure is therefore to be considered one-sided and thus negative from an equality policy standpoint.

Financial Support: Departures from Procedure with Consequences for Equality Policy

Financial support, within the budget-oriented framework of this Expert Opinion, includes the topped-up and newly created programmes of the KfW Development Bank, the Loan and Guarantee Programme for the Private Economy and regional administrative bodies, as well as earmarked promotion of trade and industry. Given the multitude of measures, which are assigned to different programmes, they will not be evaluated individually. However, fundamental aspects of fund allocation which are of considerable interest for equality policy will be discussed. Since individual measures will not be examined the following



remarks cannot be included in the budget-oriented evaluation. However, they will be emphasised in the summary as an outcome.

The economic stimulus packages are time-limited measures which were supposed to be implemented primarily in 2009 and 2010. Given the sheer volume of the funding involved and, in particular of certain especially substantial measures, this means that the public institutions administering the funds have to distribute them on a priority basis, rapidly and with as little bureaucracy as possible. Due to procurement guidelines and European provisions, but also because of the personnel situation in the public administration this will be only partly possible. Various strategies will therefore be applied to cope with the additional administrative costs in the allocation of funds. This includes cooperation between different authorities, within the framework of which administrations second staff to other authorities, the relaxation of allocation criteria regulated officially within the framework of the economic stimulus packages and internal administrative instructions as regards prioritisation. A further solution to the problem of fund distribution is the establishment of new bodies. With regard to the relaxation of allocation criteria, prioritisation and the establishment of an allocation body, in what follows we shall look specifically at the steering committee of the Germany Fund.

Relaxed Allocation Criteria

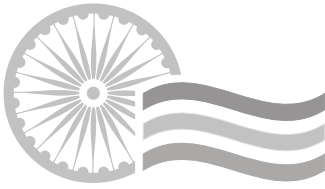
Within the framework of economic stimulus package II measures were agreed, among other things, for more rapid allocation of government money for construction work and services and delivery. The amount of money was increased up to which contracts can be awarded on a discretionary basis, in other words without a tender procedure, and up to which tenders can be announced on a restricted basis, that is, to a limited circle of possible bidders determined by the issuing authority itself. As it stands, these regulations are set to expire at the end of 2010 and apply to the allocation of federal funding. The majority of the orders to be expected concern infrastructural measures. The idea is that the Länder and municipalities can utilise resources more quickly and with less bureaucracy because of their own exemption regulations or the temporary suspension of municipal budget law.

Despite the advantages of such a simplification of allocation it nevertheless tends to be inconsistent with the principle of equality and favours bidders with personal contacts with the issuing authorities. Men are overrepresented in political decision-making bodies, particularly in local government and in the upper echelons of administrations (cf. Kletzing 2009). Facilitating the circumvention of formal procedures de facto reinforces existing informal networks, which are largely male-dominated. As a result, these develop, among other things, a gender homogeneity since the »principle of social similarity« familiar in organisational psychology is at work here: people who are perceived as being socially similar tend to be chosen when tasks and positions are being distributed. Since men are oriented towards men in this respect and identify far less often with women, simply because they are the opposite sex, men are generally much more at ease with one another. The informalisation of allocation, therefore, reduces the chances of the in any case relatively few services and trade businesses headed by women even further.¹⁶ The relaxation of allocation criteria entails, therefore, the abandonment of formalised, technically-oriented and supervised procedures in favour of informal, network- and self-interest directed allocation, from which men in particular benefit. In neutral terms, this can be depicted as follows: »Bidders who are known to the public authorities will benefit from this. However, it will discriminate against those bidders who are entering the scene for the first time since the path through public tenders in which all bidders can participate is blocked due to the narrow scope of those pre-selected to join in ... This is fine for those who benefit from this kind of allocation, but tough luck for those who are not able to participate in a given tender« (Keller-Stoltenhoff 2009). Equal opportunities for men and women are not provided by such procedures.

¹⁶ Cf. section »tax deductibility of trade services«.

Priority Allocation of Funds from the Economic Stimulus Packages

In economics, »crowding out« designates the displacement of private economic consumption and investment activities by state consumption and investment activities. The economic stimulus packages, however, were universally welcomed and



this classical liberal argument against state cyclical policy was not even raised. Nevertheless, a process of crowding-out although of a different kind can be observed in relation to the acceleration of resource allocation. Very tight time schedules were included in the economic stimulus packages with regard to the allocation of resources in order to forestall an economic downturn or to cushion its impact. As a result, the authorities responsible for allocation are required to process the available funds on a priority basis. This leads to the neglect of the allocation of other funds, for example, for social projects of the European Social Fund (ESF). Pressure of work means that tender or project approvals are postponed. While ESF programmes include social policy aims such as inclusion and equal opportunities such criteria are not found in the economic stimulus packages. The measures are aimed exclusively at stimulating the economy without regard for social developments that might be fostered or restricted by the choice and design of measures. That means that projects to which clear social policy aims, such as equality, apply are crowded out in favour of projects without social policy aims. Economic stimulus which is blind with regard to equality and whose effects are therefore often negative in that respect (cf. Schambach 2010) crowds out state and state-supported involvement that might have positive effects for the development of equality.

Germany Fund: Rescuing the German Economy

We shall now examine the central decision-making bodies of the administration of the Germany Fund, based on how things stood at the time of its establishment (2009). We shall evaluate access to decision-making power and to funding as they pertain to this key feature of state crisis intervention from the perspective of gender-democratic balance. In the process, besides problems with regard to equality, other problems will come to light concerning democracy and social policy.

In economic stimulus packages I and II a total of 11 billion euros were earmarked for loan allocation and guarantees. These funds are managed in the »Economic Fund Germany«, also known as the »Germany Fund«. Loans are granted within the framework of special programmes for SMEs (15 billion euros) and for large companies (25 billion euros) as

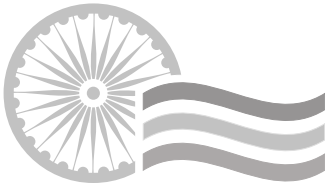
special loans by the Development Loan Corporation (Kreditanstalt für Wiederaufbau). A guarantee committee makes decisions on federal guarantees (75 billion euros). Applications will be considered from those companies that have »no access of their own to the capital market«. This means that applicant companies are not deemed creditworthy in the absence of further assistance or have no alternative options for obtaining guarantees. The aim is to support companies undergoing temporary financing problems.

The management of the Fund is presided over by a ministerial steering committee, in which the Ministry of the Economy, the Interior Ministry and the Finance Ministry are represented, as well as the Federal Chancellery. The ministries delegate their permanent secretaries and the Federal Chancellery delegates an economic policy expert (Jens Weidmann). The committee was chaired by the then permanent secretary of the Ministry of the Economy, Dr Otremba. When the committee was established all the permanent secretaries in the relevant ministries were men. The change of government, however, brought one woman Birgit Grundmann, permanent secretary at the Justice Ministry onto the committee. The members of the steering committee are therefore almost exclusively men.

Applications for guarantees, depending on the amount, are made through house banks, directly to guarantee banks or to the economic ministries of Federal states. In the case of guarantee applications of 50 million euros and above (or 10 million in the new Länder) applications are made directly to the private auditor PricewaterhouseCoopers.

The steering committee is advised by the steering council, which makes recommendations on decisions on guarantees worth 300 million euros or more or loans from 150 million euros. The following persons were originally appointed to this committee with the agreement of the Ministries of Finance and the Economy:

- Michael Rogowski, former President of the Federation of German Industry (Bundesverband der Deutschen Industrie);



- Hubertus Schmoldt, head of the trade union for the Mining, Chemical and Energy Industry (Industriegewerkschaft Bergbau, Chemie, Energie);
- Walter Hirche, former economics minister of Lower Saxony (FDP);
- Alfred Tacke, former state secretary for economic affairs and now working for a company in the coal industry;
- Jürgen Heraeus, of the precious metals company Heraeus Holding GmbH;
- Nikolaus Knauf, managing partner of the Knauf Group (core business plaster and plasterboard);
- Hubertus Erlen, former head of pharmaceutical firm Schering; and
- Martin Hellwig, economist.

The Ministry of the Economy, which is responsible for appointments to the steering council, blatantly ignored the Law on Appointments to Federal Bodies (Bundesgremienbesetzungsgesetz). This law lays down that men and women drafted in by the Federal government, a Federal ministry and so on to serve on committees should have equal participation: in other words, must be represented equally. Furthermore, it is important to note that as a result of the selection of experts the representation of economic branches is very unbalanced: all the men from the business sphere come from the traditionally male industrial sector, in which over two-thirds of employees are men. The service sector the sector of the economy which is experiencing incessant growth and in which women make up 80 per cent of employees is not represented at all. This unbalanced representation of economic sectors gave rise to criticisms of alleged bias right from the outset of funding allocation by the Germany Fund (see Handelsblatt, 24 May 2009).

Examination of the Germany Fund also brings to light another exclusion mechanism of considerable

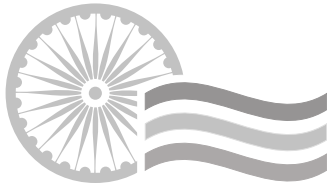
relevance to democracy: all representatives in the steering council are western Germans. Apparently, the paths taken whether long or short to appoint experts bypass both western and eastern German women and eastern German men. From an equality policy standpoint this means that the committee that plays a substantial role in decision-making about the distribution of a considerable portion of the funding of the most significant in financial terms measures of the economic stimulus packages represents only western German men from the most male-dominated branches of the economy. Appointments to committees which disregard the Law on Appointments to Federal Bodies and call on expertise only from business sectors in which women are barely represented and which, on top of all that, include only western Germans, must be regarded as extremely questionable on the basis of equality criteria.¹⁷

¹⁷ With regard to the exclusion of eastern Germany, see also the sections on broadband and changes in income tax.

Broadband Strategy: Equal Opportunities and Equality Put on the Backburner

In economic stimulus packages I and II, within the framework of the »Loan and Guarantee Programme Fostering Investment, Innovation and Demand in the Economy« the expansion of broadband provision¹⁸ is mentioned under »resolution 6«. This issue has long been on the political agenda. Since 2005 the development of broadband provision has been documented by the Federal Ministry for the Economy and Technology's so-called »broadband atlas«. Since 2003 the European Commission has been stressing the need to close the broadband gaps in Europe (European Commission 2006).

¹⁸ By »broadband connection« nowadays is understood a connection to a data transmission line which allows the transfer of at least 1 megabits per second (Mbps) and thereby relatively fast Internet access, with all its possibilities for information and communication, including e-mail, websites, Internet telephony and so on. The most important forms of transmission line which transport larger volumes of data are DSL, cable, wireless or UMTS. Broadband connections are to be distinguished from narrowband technologies such as ISDN and modems. As a guide: 1,000 kilobits make up 1 megabit. Transfer rates of below 1 Mbps allow, given the data volumes normal in most Internet applications today, only very slow surfing. On the other hand, 16 Mbps make possible television via Internet. In monitoring reports, such as the »broadband atlas« of the Federal Ministry for the Economy and Technology, an extensive conception of broadband is used which includes transfer rates starting at 384 Kbps.



The Federal government's aim is to achieve comprehensive coverage of all areas with efficient broadband connections by the end of 2010. Within four years after that, 75 per cent of all households should be provided with data lines up to 20 times faster than today's DSL lines: 50 Mbps is the plan. By 2018 all households should be part of this infrastructure. Growing data volumes within the framework of standard services for example, due to interactivity necessitate a certain technical (if not necessarily a particularly high one) transmission capacity. The achievement of such minimum standards is a necessary condition for participation in the Information Society.

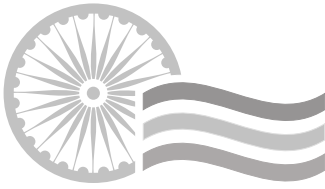
In the »Federal Government Broadband Strategy« elaborated after the economic stimulus packages the development of rural areas is mentioned as a priority and the short-term goal of comprehensive coverage of all areas laid down. For this purpose the municipalities were promised funding of 150 million euros. With that they are supposed to create an infrastructure which can then be put at the disposal of companies. Investments are expected from cable and telecommunications companies worth 50 billion euros 300 times as much as the government funding. Between 70 and 90 per cent of the costs of expanding broadband provision will be for excavation and cable laying work. The categorisation of the broadband strategy as an economic stimulus programme for the construction industry therefore seems obvious. The broadband strategy will create jobs primarily in civil engineering, which is male-dominated to a very high degree. Providers of Internet technology will also benefit: predominantly men (at least 75 per cent) are employed in the telecommunications and information technology branch (see Schambach 2010).

The need for comprehensive broadband coverage is justified by political actors, such as the Chancellor (see Podcast of 28 February 2009) or the German Association of Towns and Municipalities, primarily on the basis of economic arguments. For example, this is an important locational factor for rural regions with regard to the settlement there of businesses and families. It is also relevant for Germany's competitiveness and promises to create 250,000 jobs. Mentioned less frequently are social policy reasons, such as equal opportunities for access to modern technologies, equality of living conditions in rural and

urban areas or equal participation in technological development in rural areas. While the EU mentions that the significance of new information technologies for society can scarcely be foreseen (European Commission 2006), it argues purely on an economic basis for broadband technology provision, for example, to foster positive developments with regard to wages and returns on capital.

Prologue: Access to the Internet via Broadband Technology Is the Main Issue Competitiveness or Democracy?

In order to evaluate the broadband strategy from an equality standpoint it is crucial to ask what significance the new technologies have for the development of society. Comparisons with similar technological developments point to some obvious answers. At the beginning of the development of the telephone its revolutionary power could not be foreseen. It crowded out existing forms of communication, such as the pneumatic post and the telegram, enabling ordinary people, who were unable to afford the other technologies, to benefit from direct communication. As with all supply networks for example, the railways the setting up of a telephone network was extremely expensive and it therefore made sense to build it by means of a company whose aim was to maximise profits over the long term or on a non-monetary basis. Due to the massive initial investment, creating a telephone infrastructure via market-based competition was out of the question (since it was a »natural monopoly«). The telephone network was therefore developed with massive state investment so that access to it would be within the means and reach of the average person. It was recognised as part of the sensitive core infrastructure of a country, made a sovereign task and put under state control. When the mobile phone was introduced it could not be foreseen that it would ever become something taken for granted and, due to its widespread use, be regarded as indispensable for participation in private, civil society and business networks. The crowding out of older technologies by new ones is also strikingly illustrated by the decline of video recorders with the advent of DVD. These comparisons show what has already emerged over the past two decades with regard to Internet access and will become more important in the future:



this technology will be the standard for access to communication, information and education, forms of political participation, goods and services, but also, in the other direction, access to citizens, consumers and other networks. Anyone »on the inside« is part of the Information Society; anyone not on the Internet is shut out. The role of Internet technology for social cohesion, access to prosperity, participation in society and equal opportunities can scarcely be overestimated.

Narrowing the significance of all this to opportunities for economic development sells it short in terms of its potential and importance for society as a whole. This is the starting point of our evaluation of the broadband strategy from the standpoint of equality policy.

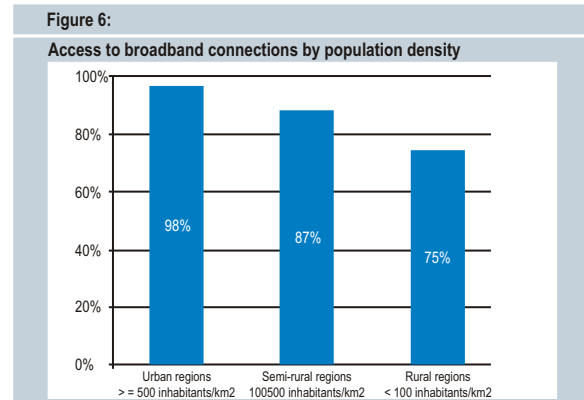
»Digital Divide« Differences in Access to and Use of Broadband Technologies from an Equality Standpoint

There has been a great deal of research on the so-called »digital divide«: the gap or even the gulf between users and non-users of modern information technologies. This gap is characterised by a whole range of social divisions, including urban/rural, gender, age and east/west. We shall now present the provision of broadband technology and the »digital divide« in Germany in order to establish how things currently stand in this policy area. On this basis we will be able to evaluate the broadband strategy from an equality standpoint.

Broadband Provision

In Germany, around 93 per cent of households have access to a broadband connection of at least 1 Mbps. In urban regions (with at least 500 inhabitants per square kilometre) the rate is as high as 98 per cent. In semi-rural areas (100500 inhabitants per km²), however, the figure is 87 per cent, while in thinly populated areas (fewer than 100 inhabitants per km²) just under 75 per cent of households have access to broadband technology (see Figure 6). At the beginning of 2009, around 600 communities or 730,000 households were still without any broadband connection. In a further 692 communities less than half of all households had access to the current transmission standard. So-called »not spots« (or »white spots«) in which the provision of broadband technology for communities is below 25 per

cent or even non-existent are found especially in Saxony-Anhalt, Mecklenburg-Western Pomerania which have the lowest population density in Germany and Saarland. Supplying thinly populated areas is particularly difficult for technical and economic reasons.

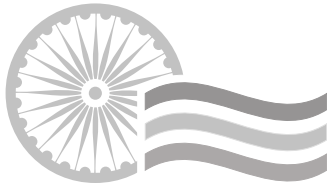


Just because a locality is connected to broadband technology does not necessarily mean that people will make use of it. Private households are responsible for obtaining a connection to the broadband network, just the same as in the case of the telephone. Provision of the technology is therefore greater than actual use of broadband: although the technical availability of broadband is over 90 per cent only around 46 per cent use it.

The Digital Divide between the Genders: Internet and Broadband Use

Around 69 per cent of the population use the Internet. Among young people (up to 29 years of age) the figure is over 90 per cent, while among those 50 years of age and over the figure is only 45 per cent. There are also differences between the genders: out of the total population in Germany around 37 per cent of men and 32 per cent of women are online (see Figure 7). Underlying this difference between the genders are the substantial differences in the older age groups: among those over 50 years of age 56 per cent of men, but only 35 per cent of women are online (Presseinfo D21: Große Unterschiede in der Generation 50plus [Major differences in the 50 plus generation]). In the younger age groups (up to 25 years of age), however, the differences between males and females are minor.

Furthermore, around 66 per cent of all Internet users have broadband, but here too there are significant



differences between men and women: around 74 per cent of men have broadband, making up just under 28 per cent of the population as a whole, while only 56 per cent of women have broadband, comprising only around 18 per cent of the total population (see Figure 7) (Presseinfo D21: Breitband treibt Internetwachstum [Broadband drives Internet growth; author's calculations]).

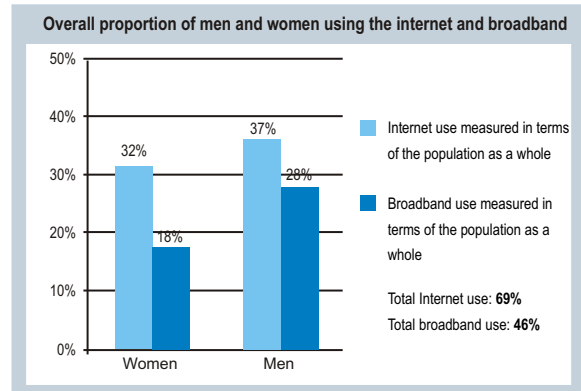
Besides the »gender digital divide« the differences between men and women with regard to participation in the new media there are also differences between eastern and western Germany: while over 70 per cent of west Germans are online, in eastern Germany the figure is only 63 per cent. The proportion of the population with broadband in Thuringia, Saxony, Brandenburg, Mecklenburg-West Pomerania and Saxony-Anhalt (in that order) is below the average for the country as a whole.¹⁹ Among the western Länder only Saarland falls below the national average.

¹⁹ With regard to the exclusion of eastern Germany, see also the sections »Germany Fund« and »Changes in Income Tax«.

Research shows that infrastructural accessibility in other words, the level of provision of broadband connections is not enough to explain the regional differences in Internet use (Schleife 2006). The mere fact that a given area is connected up to the broadband network does not mean that the population will embrace the modern world of communications and information technology. Other factors determine the regional digital divide. For example, a person is more likely to be an Internet user the younger and the more educated they are and also the higher their income. There is also a higher probability among men and among urban dwellers, as well as among those living in larger households (Schleife 2008; (N)onliner-Atlas 2009). Low use of the Internet can be a symptom of structural disadvantage and at the same time is a cause of continued disadvantage in terms of access to resources, such as knowledge and participation in society.

Besides the fact that the eastern regions of Germany are still poorly connected, the population structure here gives us little reason to expect that merely making broadband technology available will give rise to many new users: the unemployment figures and thus the

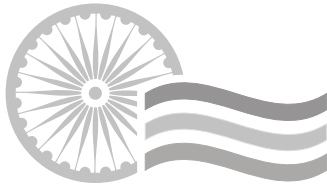
Figure 7:



number of households with low incomes are high in the Länder with poor broadband connections and a large number of »not spots«, in particular Mecklenburg-West Pomerania, Saxony-Anhalt and Brandenburg. Considered in terms of »political types« (Müller-Hilmer 2006) the group of »complacent traditionalists« has above average representation in rural areas, while in eastern Germany it is the »dependent proletariat«. Although there is a high proportion of men in the young and middle age groups, which would tend to bode well with regard to connection to the new media, these men tend to be characterised by intermediate levels of education and high unemployment rates. In other words, they belong to a group with a low probability of Internet use. The »traditionalists« are above all »female traditionalists« and likewise have only a basic education. This type comprises the largest proportion of over 60s, including many widows. On top of that, older women constitute one-person households much more frequently than older men. These are all socio-structural characteristics that point to low Internet use in the future. In eastern Germany the two types make up 35 per cent of the population. In fact, the proportion of people who have no plans to acquire an Internet connection in Mecklenburg-West Pomerania, Saxony-Anhalt and also Thuringia is between 32 and 34 per cent. (This also applies to Saarland; in Brandenburg it is 29 per cent.)

A Narrow Broadband Strategy?

The issue of the dissemination of broadband technology is being debated primarily as a technical challenge. The central and, increasingly, the social



significance of new technology as the key to participation in society and in areas such as education, information, communication and, more and more, the supply of essential everyday goods is not taken into account. As a result of this narrow technical approach to the challenge of providing the population with a new infrastructure, on the one hand, we are losing sight of the role of these technologies in the democratic development of society and in terms of equality. On the other hand, the question of the role of the state as guarantor of equal living conditions for all is not even being asked. The possibility of so arranging the utilisation of the technological infrastructure that it improves people's lives and in terms of public welfare will not even arise if broadband access is considered merely as a technical problem of the profitability of private investors. Beyond this fundamental void the broadband strategy does not specify why private companies should invest in thinly populated areas with few people with even an interest in the Internet and thus a very low proportion of potential customers and on top of that in an infrastructure which in classical terms requires a »natural monopoly«. Even if the Internet could partly compensate for the increasingly poor rural infrastructure for example, through the supply of goods and service infrastructure, such as banks, post and so on it cannot be assumed that the population groups which, in terms of socio-structural characteristics, are non-Internet users will nevertheless become customers of Internet service providers. The people who correspond most closely to the ideal-profile of potential new customers for Internet service providers young, well educated men with higher incomes are scarcely to be found in regions which have a lot of catching up to do. If the new information and communication technologies are to be made more attractive to all citizens a lot more needs to be done than merely to create the technical infrastructure. What is needed is to target, foster and support people who so far, for various structurally determined reasons, have not gained access to virtual information and services or their utilisation. Complementary programmes to accompany potential Internet users as an integral part of the strategy would also provide opportunities for employment in less male dominated areas. If a broadband strategy, beyond the announcement of government subsidies for men's jobs in civil engineering and the privately owned

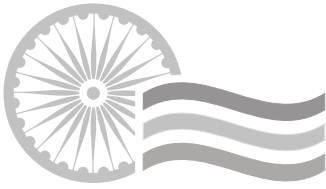
telecommunications industry using tax revenues, is to provide everyone with social policy gains, smart gender-differentiated target group-specific measures which take account of regional social structures are needed. Important target groups here include men who might be characterised as belonging to the »dependent precariate« and older women.

A gender analysis demonstrates not only the lower participation of older women and certain groups of eastern German men, but also the negative effects which a purely market economy-oriented view of broadband provision could have on already marginalised groups. Such effects can only increase as the importance of the new information and communication technologies continues to grow. The broadband strategy neglects the »digital divide« and contributes nothing to its reduction. This constitutes a lost opportunity to distribute access to participation in modern media more fairly. Taking a gender-differentiated standpoint in the planning of the broadband strategy would have shown the need to actively tap into new groups of Internet users. This aspect of potential gains from the broadband strategy represents a blind spot. The social significance of technology and thus of the state in making available key infrastructure would also have been demonstrated by a gender analysis.

Because of its one-sidedness with regard to labour market effects the broadband strategy clearly benefits men. More balanced integration of women in job subsidies in the, in any case, male dominated sector is excluded due to its current design as a purely technical task. The existing need for equality policy action with regard to participation in new technologies, as well as their key role in positive, equality-oriented development and the need of the state to take advantage of this potential, are completely neglected. For these reasons the broadband strategy is evaluated as utterly unsatisfactory and negative from an equality policy standpoint.

Analysis from the Standpoint of the Care Economy:
Selective Repairs in the Face of a Foreseeable
Investment Bottleneck

National economies consist of more than the market.
Other key components include the often overlooked



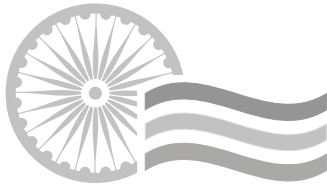
non-market sectors, such as private households and voluntary organisations, in which a sizeable amount of work and investment needed by society is carried out. This includes the safeguarding of production conditions through the preservation of workforces, the »production« of new workers and the passing on of knowledge, culture and »cultural knowhow« as the basis of societal including economic activities. In political economy, this portion of economic activity, to the extent that it is conducted in the private sphere and free of charge or not in accordance with the rationality of profit-maximisation, is usually categorised as reproduction and thus disappears from view. In order to do justice to the real significance of this sector of the economy and to the work typically carried out in it, such as education, care and provision of people's fundamental needs including nourishment, clothing, regeneration and attention and also to make visible the market's intertwining and dependency on the non-market sector, the concept of the »care economy« was developed. Since it is primarily women who work in the care economy it is not surprising that, within political economy, it was feminist economics which identified and developed the topic.

Within the framework of a gender analytical Expert Opinion evaluating the equality policy quality of measures in the economic stimulus packages, looking at things from the standpoint of the care economy justifies itself. The care economy, as a sector of economic activities involving caregiving and related services and so with »female« connotations, is ranked at the bottom in the value hierarchy of economic activities and systemic importance. A gender hierarchy is at work here in which the female-dominated service sector is valued below the male-dominated industrial sector and in comparison to that not regarded as of systemic importance. The question of what support is provided for the care economy in the crisis is therefore a key issue with regard to equality between men and women at the level of »male«-connoted and »female«-connoted economic sectors. Besides gender relations at the individual level and the societal gender structures of the social groups »men« and »women« normative gender structures become discernible here in accordance with which value and recognition are distributed.

Based on these findings individual measures of the economic stimulus packages will be examined in respect of which one can assume a prima facie connection with the care economy. Among the 15 measures involving direct expenditure only the child bonus, the increase in the standard rate for children as regards basic social security, future-oriented investments by the state and the Federal subsidy to the statutory health insurance funds seem to be directed towards the care economy. What is at issue is whether these measures really benefit this sector. The tax concessions did not include any which directly affect the care economy. As regards financial support, the programmes intended to help regional authorities might be relevant. As already mentioned, however, this expenditure category is evaluated solely in relation to the distribution of resources. The debt limitation rule, which is not quantifiable and therefore not to be categorised within the framework of the budget, will be examined here because of its particular impact on the care economy.

Child Bonus and Raising of Standard Rates for Children

Within the framework of the family- and child-related provisions of the economic stimulus packages a one-off payment of 100 euros was made to recipients of child benefit which, in contrast to child benefit, was not to be set off against social transfers. Furthermore, the standard rates for Hartz IV and income support for children aged between three and seven were increased. This increase in the standard rates was able to take advantage of the political window of opportunity provided by the crisis. Even before the adoption of the economic stimulus packages this had been deemed necessary, but simply not politically feasible. Subsidies for children are given to adults in their role as carers and are intended to give parents a bit more purchasing power. Notwithstanding the debate on the appropriateness and viability of the standard rates, which was formally ended by the ruling of the Federal Constitutional Court, the state is acting here in its role as provider of care, assuming social responsibility for the prevention of poverty. Both measures are therefore to be evaluated as basically positive because they reinforce the care economy. This is an evaluation in principle which says nothing about appropriateness or



effects. With 1.8 billion euros for the one-off child bonus and around 600 million euros in 2009 and 2010 for increasing the standard rates this comes to a total of 2.4 billion euros. This is far below the third direct subsidy to citizens, the environmental premium (at 5 billion euros).

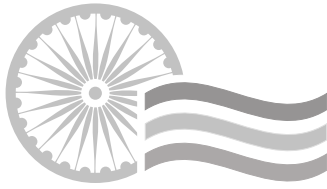
Future-Oriented Investments by the State

Future-oriented investments by the state, at 14 billion euros, constitute the largest sum in the economic stimulus packages, leaving aside financial support measures, even outstripping the relinquishment of revenues via the changes in income tax law (around 9 billion euros). Of this 14 billion euros, 10 billion are intended for Länder and municipalities, which must contribute a further 3.3 billion euros of their own (BMF 2009). Four billion euros were earmarked for investment at the Federal level. The state is the supplier of public services which principally serve public welfare and the maintenance of public goods. It therefore makes sense to assume that this expenditure benefits the care economy. It would be necessary to look closely at actual spending in order to make a conclusive evaluation. At this point we shall make a first assessment on the basis of the purposes intended by the law and the known preliminary plans. The one-sided labour market policy effects which, especially in construction, primarily benefit the employment of men and the problems related to the awarding of contracts arising from the informalisation of fund allocation (see above) will not be considered here.

The funds for the Länder and the municipalities were earmarked in the Future-Oriented Investment Act (Law on the Implementation of Future-Oriented Investments by Municipalities and Federal States, 2 March 2009) for the infrastructure of educational establishments, ranging from early childhood education to adult education and research, and for hospital infrastructure, urban development and rural infrastructure (not including public transport), noise prevention, information technology and other infrastructural investment. Even though investment in infrastructure principally means construction measures investment in the education sector should be evaluated as generally positive for the care economy. These investments provide an opportunity to resolve an investment deficit which in some instances goes back a long way and at

least to make a start on improving the working and learning conditions in educational institutions. With regard to the other investments, without examining them in more detail, public transport is explicitly excluded. Despite its significance, particularly during crisis periods (see section on Transport), it came away empty-handed from the economic stimulus packages: it was even made an exception of with regard to the environmental premium and also excluded from the economic stimulus package measure on accelerating transport investment through the »Innovation and investment programme« on the grounds of federal jurisdiction. From a care economy standpoint this is regrettable. Among other things, public transport bestows on children above a certain age independent mobility without the need for an accompanying adult, while for women as the »main workers« in the private care economy it is especially important in enabling them to carry out their work (see section on Transport). The focus on noise prevention with regard to public roads is to be positively evaluated because of its beneficial health effects. With regard to investments in information technology, urban development, rural infrastructure and so on the law lays down that primarily municipalities should earmark the money and so it is to be assumed that it will benefit public institutions in education, care and regeneration. At the outset of the programme there was a clear emphasis on expenditure for school infrastructure and higher education. Over half the money was used in these areas (Bundestag 2009: 14f). To begin with, only 7 per cent or just over 6 per cent was earmarked for traditional welfare domains such as pre-school care and hospitals. A conclusive evaluation therefore requires a more detailed examination of the distribution of funds between Länder and municipalities and their specific use.

Four billion euros of future-oriented investment were disbursed directly by the Federal government, 650 million of which went for the equipping and procurement of government departments. Among other things (see Bund der Steuerzahler [Taxpayers' Association] 2009), equipment and technical infrastructure were procured for ministerial offices. The Defence Ministry invested in armaments. The Federal government acted here as consumer of market goods. This portion of Federal investments therefore does not benefit the care



economy. No information is available on the spending of the rest of the money.

Generally speaking, we can expect that public investment will benefit the care economy. However, these measures partly involve long overdue restoration and repairs of buildings and facilities. The crisis intervention therefore has rectified existing shortcomings only in certain instances. There has been little by way of improvements or safeguarding of provisions in respect of state-organised institutions of care and welfare. This necessarily qualifies the positive evaluation. Furthermore, the traditional areas of the care economy which are chronically underfinanced in particular, pre-school care and care of the old and sick have to share a small part of the money. From an equality standpoint this must be evaluated negatively. The picture which emerges shows that, ultimately, the public investments which otherwise are to be welcomed will support the care economy during crisis periods only to a limited extent. The future-oriented public investments must therefore provisionally be categorised as neutral from an equality standpoint. A conclusive evaluation is possible only on the basis of a more detailed examination of resource allocation.

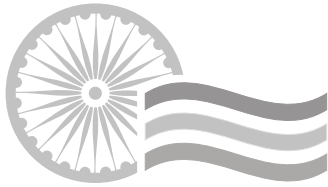
Federal Subsidy for Statutory Health Insurance Funds

At first sight, one might think that the Federal subsidy for statutory health insurance funds would constitute a contribution to the care economy. Statutory health insurance operates in accordance with the solidarity principle, not the profit-maximising logic of the market and thus its reinforcement represents a reinforcement of community solidarity and an improvement of conditions in the health care sector, which is very much part of the care economy. From an equality policy standpoint, however, it must be emphasised that the statutory health insurance fund system does not discriminate against women on the basis of their child-bearing capability during a certain period of life with significantly higher contributions and recognises the individual consequences of the reproduction of society, similar to injuries incurred doing high-risk sports, as risks to be borne by the community. Subsidies to statutory health insurance by the Federal government are taken from tax revenues, however, and this funds a

reduction in contributions (by 0.6 per cent) funded equally by employees and employers. In the first instance, therefore, employees and employers are granted relief: in other words, citizens in their role as economic subjects of the market economy. More precisely, it reinforces their status as employees or potential employees liable to social insurance contributions. No more money flows into the statutory health insurance funds as a result of this, therefore, and the state pays the cost, putting an enormous strain on its financial room to manoeuvre. At 9 billion euros this measure is by far the biggest direct expenditure, after future-oriented public investment. Among other things, due to the relief of the state as contributor to statutory health insurance (for example, the Federal Employment Agency for the unemployed, the state as employer) the actual burden imposed on public budgets is still around 7 billion euros (Leifels et al. 2009: 6). The care economy, therefore, does not receive more money, but it does not receive less, either. However, the state funds citizens and companies in their market economic roles irrespective of their contribution to the care and support of members of society. These funds are lacking for the provision of public goods for these purposes. As a result, the effect on the care economy is, on balance, negative.

Introduction of a New Debt Limitation Rule

One measure which will have a particular effect on the care economy is the introduction of the new debt limitation rule. Among other things, the structural deficit that is, the permanent deficit which does not result from economic factors or on the basis of time-limited statutory measures such as the economic stimulus packages is limited to a maximum of 0.5 per cent of GDP. Currently, the structural deficit stands at 2.8 per cent (BMF 2010). In order to achieve the lower figure, cuts are envisaged in the public budget, in particular during periods of economic recovery. Since there has been no change in economic policy priorities in favour of the care economy during the crisis, the consolidation measures with regard to the state budget will affect in the first instance public services in the area of the care economy. This means that the elimination of the investment bottleneck in this area will come to a standstill. Furthermore, the state will have less room to



manoeuvre with regard to social policy, for which the need will be all the greater due to the crisis: the current job preservation measures are related primarily to formally employed workers, not those in precarious employment. In relation to so-called »atypical« or precarious employment no incentives are provided to maintain jobs or protection against the poverty that is to be expected as a result of rationalisation during crisis periods. The cutbacks in state services in the care economy will be absorbed by the care economy of private households, in other words the unpaid work of women. This corresponds to an increase in working time or workloads without any form of compensation. Account should be taken of the fact that »reproduction time«, such as holidays which are a matter of course in employment in a market economy is not provided for in the private care economy. The massive expenditure in the area of the market economy which primarily protects the jobs of men in non-precarious employment is paid for at the expense of the state's future ability to provide public goods, which are largely to be ascribed to the care economy (health, education, integration, social justice...) (see Dauderstädt 2010). The debt limitation rule virtually declares the relinquishment of the state's capacity to act to be a government aim. The provisions and services of the state which are to be cut will have to be substituted primarily by the private and voluntary care economy in which the labour costs have to be borne individually.

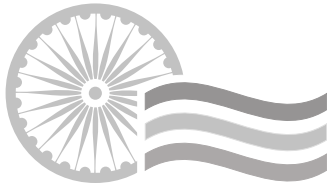
3. Evaluation: The Equality Policy Quality of the Measures and Their Particular Weighting in the Budget

The budget of the economic stimulus packages was classified in accordance with three categories of arising costs direct expenditure, tax concessions and financial support and assigned to the target groups of citizens, the public authorities and the private economy. After that, the selected measures were examined in terms of their equality policy quality. The measures of the economic stimulus packages were evaluated as »positive«, »negative« or »neutral«, depending on whether they make a positive or negative contribution to the development of equality or whether they are neutral. Now we shall bring these two steps of the analysis together: the results related to the measures we have

considered will be summarised in terms of the budget structure and the volume of measures evaluated as positive, negative or neutral within individual budget categories identified.

Direct Expenditure

Direct expenditure made up 24 per cent of the total volume of the economic stimulus packages. Within this expenditure at least 45 per cent of the funds were deployed in such a way that they did not benefit men and women equally, but rather went disproportionately to men: with regard to direct expenditure the measures connected to compensation for short-time working (prolongation of compensation for short-time working, subsidies for training/education during short-time working, topping up of ESF funding for employment protection for those working short-time, reimbursement of social insurance contributions related to short-time working) were evaluated as negative with regard to equality since these measures concern only »regular employment« and operate in male-dominated sectors of the economy. The measures are welcome, but the gaps or the lack of an equivalent for »atypical« employment which become discernible through analysis are criticised. These jobs which in any case have worse conditions with regard to job security, pay and collective agreement protection and for that reason are the first in the firing line in the crisis come away from the economic stimulus packages empty-handed. In structural terms, the measures predominantly encompass typically male employment, while typically female employment is excluded and no equivalent measures are taken for protection against job losses or a deterioration in employment quality due to the crisis. The negative assessment is therefore based on the one-sidedness of the measures in favour of men and the lack of adequate crisis protection for jobs and sectors of particular relevance to women. It must be noted that to the weighting of measures with a negative outcome in equality terms a further negative weighting must be added because of the omission of crisis support. However, this would involve estimating hypothetical costs, for example, in the amount of a fictive budget for measures which affect typically female employment or in the amount of the relevant social transfers. In order to remain within the framework of the current budget we shall refrain from that. The total



considered will be summarised in terms of the budget structure and the volume of measures evaluated as positive, negative or neutral within individual budget categories identified.

Direct Expenditure

volume of measures related to compensation for short-time working amounts to 13 per cent of direct expenditure.

The Federal subsidy for the statutory health insurance funds which is revenue-neutral for statutory health insurance was evaluated as negative because it commits funding which, as a result, cannot be used for the state care economy and, at the same time, no additional funds flow into the statutory health insurance funds (which are to be evaluated positively from an equality policy standpoint). This measure alone accounts for around 21 per cent of direct expenditure.

The environmental premium is evaluated negatively from an equality policy standpoint because it delimits transport users to a male-dominated target group. The employment policy effects primarily for men's jobs were not examined in more detail because they have been taken up elsewhere (Schambach 2010). The funds for the environmental premium account for around 11 per cent of the budget for direct expenditure.

The deployment of 6 per cent of the funds can basically be welcomed from an equality policy standpoint. This refers to the spending within the framework of child and family related services. It was not possible here to evaluate the adequacy of the amount of funds expended. It makes up a little less than 6 per cent of direct measures.

The future-oriented investments by the state evaluated as neutral account for around 37 per cent of direct expenditure. The time-limited investment in repairs and further development of municipal infrastructure is basically welcomed from an equality policy standpoint on the basis of its effects for the care economy, since municipal infrastructure benefits people principally in their role as carers. The employment effects of the investments are positive primarily for men on account of the focus on construction activities. The share of the funding enjoyed by core areas of the social infrastructure devoted to caring is rather modest. State

future-oriented investments are therefore provisionally evaluated as neutral for equality.

Six of the measures of direct spending, making up around 12 per cent of the financial volume of this category, were not assessed.

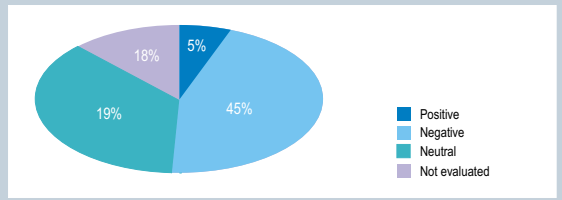
Tax Concessions

The costs involved in the tax concessions made up around 10 per cent of the total volume of the economic stimulus packages. The tax concessions which were positive for equality account for 54 per cent of relinquished state revenues.

The changes in income tax law had to be evaluated as neutral since they benefit men and women equally. Indeed, the design is such that it reaches a subgroup of low paid women who have been particularly hard hit by the negative effects of gender segregation in the labour market. The fact that part of the relief is redistributed in favour of men due to the discriminatory tax system (joint spousal tax declaration) in western Germany is not down to the relevant measure of the economic stimulus package and thus no account was taken of it in the evaluation. Around 52 per cent of the relinquished tax revenues was due to these changes.

Figure 8:

Equality policy evaluation of the budget for direct expenditure

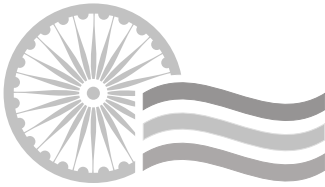


future-oriented investments are therefore provisionally evaluated as neutral for equality.

Six of the measures of direct spending, making up around 12 per cent of the financial volume of this category, were not assessed.

Tax Concessions

The costs involved in the tax concessions made up around 10 per cent of the total volume of the economic stimulus packages. The tax concessions which were positive for equality account for 54 per cent of relinquished state revenues.



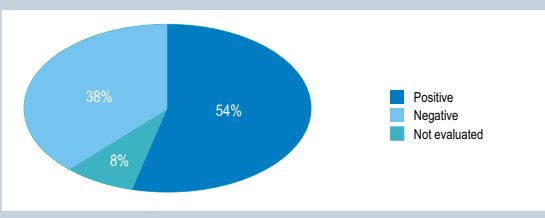
The changes in income tax law had to be evaluated as neutral since they benefit men and women equally. Indeed, the design is such that it reaches a subgroup of low paid women who have been particularly hard hit by the negative effects of gender segregation in the labour market. The fact that part of the relief is redistributed in favour of men due to the discriminatory tax system (joint spousal tax declaration) in western Germany is not down to the relevant measure of the economic stimulus package and thus no account was taken of it in the evaluation. Around 52 per cent of the relinquished tax revenues was due to these changes.

Financial Support and Debt Brake

At 67 per cent of the funds made available, financial support made up the biggest portion of the economic stimulus packages. The measures were not evaluated individually. For this reason, there is no need to describe its share of the budget. Regulations on the allocation of funds for public procurement and on financial support for the economy were evaluated. The procedures were evaluated as negative from an equality policy standpoint. Access to decision-making is organised one-sidedly in favour of men and thus favours men in terms of access to resources. For example, the changes to the criteria governing discretion and restricted tendering informalised the allocation procedure for state funds. Female-dominated and more gender-balanced economic sectors are not represented in the decision-making bodies of the Germany Fund; women are almost not represented at all. The Germany Fund alone accounts for almost 92 per cent of financial support.

Figure 9:

Equality policy evaluation of the budget of measures involving tax concessions



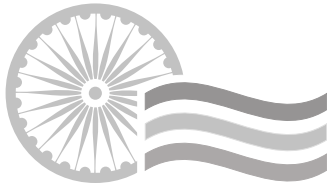
In the category of financial support four measures (accounting for a volume of a little over 1 per cent) were not evaluated.

The debt brake was not estimated, but it was evaluated as relevant to equality policy, in particular because of the extremely negative consequences to be expected for the care economy. On the technical grounds that it cannot be estimated in concrete financial terms it cannot be incorporated in the examination of the budget.

Summary

Much like the strong concentration of labour market policy measures on manufacturing industry, the composition of the various bodies of the Germany Fund shows the one-sidedness of the economic stimulus packages, which principally support economic sectors which, due to structural transformation both national and global, are in relative decline. In contrast to, for example, the service sector including public services which is female dominated, societal demand is not growing in these sectors. This is also a reason why women have been proclaimed the »winners« of structural transformation. However, no mention is made of the price paid by women in terms of the deterioration of working and employment conditions due to preceding deregulation, not to mention the lack of labour law protection in the crisis. The jobs of the »winners« are in no way to be compared with the jobs of the male »losers« although the proportion of the latter is being constantly reduced with regard to providing a livelihood, job security, working conditions and codetermination. Taking the utilisation of crisis benefits, which are tailored to normal employment, as an indicator of how the crisis is affecting women and female dominated economic sectors leads to false conclusions. Investment in the branches with job creation potential for example, in the quality of employment in order to satisfy the growing demand for workers and in future to fill vacancies more quickly is not taking place. This represents a wasted opportunity to set a course for the future in the crisis and to invest in promising economic sectors. It also means that economic resources are being directed towards the protection of jobs representing higher quality employment, while abandoning deregulated jobs to free fall during the crisis.

Not least due to demographic change and increasing poverty in Germany the care economy, with what it



provides in terms of education, care, services and so on, will be subject to great demand: in other words, precisely the areas which have scarcely been supported in the crisis and which in future will come under enormous pressure due to the debt brake and the compulsion to reduce spending. And this despite the fact that the greatest potential for new employment lies here.

Further reduction in the care economy means a reallocation of the demand for such work to private households. There it is primarily women who undertake the newly allocated work for example, the child care which presumably will not be expanded as promised.

We asked at the outset whether the state supports men and women equally, including in different roles, such as employee and carer/provider, and in the same way in order to get through the crisis, and also whether the state is equally committed to economic sectors, regardless of the gender structure (male or female dominated or balanced sectors) and regardless of implicit social assignments to productive (connoted as male) and reproductive (connoted as female) in order to help them get through the crisis.

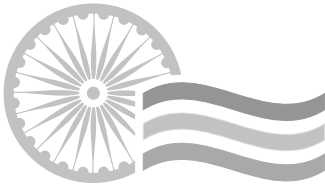
It is clear that the state with its economic stimulus packages is committed primarily to male target groups and on the basis of male dominated networks. Not only as a result of the enormously one-sided labour market effects (see also Schambach 2010) but also because of the often unnecessary limitation to male target and decision-making groups arising from how measures are designed the outcome is a structural and, owing to clustering, almost systematic although certainly unintended exclusion of women. It also turns out that not only at the level of specific groups of people, but also at the level of »gender structure« female dominated and female connoted economic sectors or sectors of society were completely left out in the cold. This omission becomes discernible only when, with the help of a gender analysis, one asks about the gaps. Then it comes to light that forms of atypical employment, which are most in need of protection because they are under constant threat of poverty and unemployment, particularly in the crisis, do not benefit from any kind of safety net. The job preserving measures in the economic stimulus packages are oriented towards »regular employment«, especially in manufacturing

industry, and maintain its ability to secure a livelihood, at least comparatively speaking. Atypical employment is female dominated; »regular employment« is male dominated. The selected economic sectors, which were supported with consumption subsidies or incentives, are male dominated. Furthermore, a gender analysis reveals that female dominated and connoted economic sectors are declared to be less relevant and, in the crisis, not meriting support or as crisis proof, while, despite suffering job cuts and to some extent maintained only by means of massive subsidies, male dominated and connoted economic sectors are regarded as particularly worthy of support. For example, the service sector, deemed »not systemically important«, was excluded from crisis support, while massive financial support flowed into industries which to some extent were being subsidised already. The implicit gender-hierarchical evaluation of economic sectors and the double standards become visible by means of the detailed approach of gender analysis.

The technical shortcomings in the design of the economic stimulus packages are essentially as follows:

- One-sidedness in the selection of target groups and target economic sectors in favour of male dominated groups and sectors.
- A lack of balance with regard to crisis support for ordinary people in favour of men.
- A lack of balance with regard to crisis support for ordinary people in their roles as employees integrated in the labour market and in the care economy, in favour of the former.
- Missed opportunities to invest in the future of the country by strengthening structures with growth potential.
- Instead of that, concentrating on shrinking and thus not »competitive« or insufficiently innovative economic sectors.

The consequences of this blindness towards the relevance of gender structures and the task of the state to make an active contribution to the implementation of equality (so often mentioned as a core element of Western countries) are negative for society as a whole. Without assigning the respective consequences to individual measures, this includes the strengthening of



the following developments which are negative with regard to social policy:

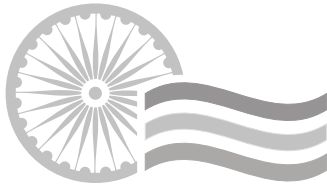
- The drifting apart of the labour market in terms of, on the one hand, subsidised, male dominated high quality employment with (formal) job security and capable of securing a livelihood and, on the other hand, (still) female dominated employment with poor conditions with regard to job security and thus certainty in terms of life plans, wages and access to an independent livelihood.
- Diminishing social cohesion (increasing poverty, exclusion of women but increasingly also of certain groups of men from participation in society).
- Massive cutbacks in the public sector as a consequence of expenditure on the economic stimulus packages.
- The increasing burden imposed on the private care economy as a result of the redistribution of financial resources to selected economic sectors which do not belong to the care economy because of the economic stimulus packages.
- The individualisation, privatisation and reduction of socially important work in the areas of care, education and integration due to the tying up of state resources in other areas.
- The retraditionalisation of gender relations via the strengthening of the traditional distribution of paid work and poorly- or unpaid work between men and women.

The overall evaluation of the economic stimulus packages on the basis of the quality criterion of equality and of its contribution to the development of equality in Germany therefore come out negative with regard to the measures examined, for the following reasons:

- existing disadvantages, including discriminatory evaluation standards, have not been reduced, but have been left intact and thus are becoming further entrenched;
- men and women do not enjoy the benefits of crisis support equally; and so

- Equal participation of women and men with regard to access to (allocated) resources such as (decision-making) power, money, time and knowledge is not enabled;
- the measures' failure to take equality into consideration has reinforced incentives to maintain traditional role patterns.





Appendix

Appendix I: Budget structure of the economic stimulus packages

Direct expenditure

To private citizens / to public authorities / to the private economy / percentage of type of expenditure

1,000 placement officers for the Federal Employment Agency

5,000 additional job placement positions for the Federal Employment Agency and joint work associations (ARGE)

Funds for bodies responsible for basic social security and the Federal Employment Agency (jobseekers)

Opening up of WeGebAU [Weiterbildung Geringqualifizierter und beschäftigter älterer Arbeitnehmer in Unternehmen Further training for low qualified and older workers in companies] (further qualifications for employees)

Prolongation of compensation for short-time working

Subsidies for those seeking to acquire qualifications while subject to short-time working

ESF funds for employment protection (obtaining qualifications while subject to short-time working)

Reimbursement of social contributions while subject to short-time working

Federal subsidy for statutory health insurance

Joint task: structure of the regional economy

Stepping up investment in transport

Future-oriented investments by public authorities

One-off child bonus

Increase in children's standard rate SBG II and XII

Environmental premium

Total

Total Direct Expenditure

Proportion of direct expenditure

Tax concessions

Deductibility of trade services

Car tax exemption

Changes in income tax

Revision of car tax

Tax depreciation allowances for small and medium-sized enterprises

Regressive depreciation of movable business assets

Total

Total tax concessions

Proportion of tax concessions

Sustainable financial policy for future generations (Debt limitation rule)

Unspecified financial support

KfW Programme for refurbishment of energy systems in buildings

Topping up of KfW Programme for municipalities

Special fund for energy efficiency in small and medium-sized enterprises

Promotion of innovation among SMEs (Innovationsförderung Mittelstand or ZIM)

Innovation support (ERP Enterprise resource planning) / unspecified

Support for applied research

Funding for broadband infrastructure

KfW Special Programme for SMEs

KfW Special Programme for larger companies

Federal guarantees

Export financing unspecified

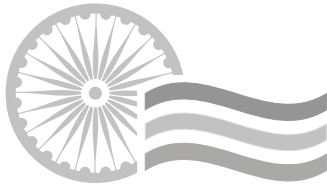
Total

Total financial support

Proportion of financial support

Summary

Direct expenditure



Appendix

Tax concessions
Financial support
Total

Sources: Bundesministerium der Finanzen [Federal Finance Ministry] (Monatsbericht [Monthly report] digital February 2010), Eicker-Wolf et al. 2009, Leifels et al. 2009, Bundesministerium für Wirtschaft [Federal Ministry of the Economy], Information and Press Office of the Federal Government, author's calculations.

Appendix II: Equality policy quality of measures and the proportion of the budget they represent

Direct expenditure

Equality policy evaluation
Main reason for evaluation
Proportion of the budget for the given type of expenditure

1,000 placement officers for Federal Employment Agency / Not evaluated

5,000 additional job placement positions for the Federal Employment Agency and joint work associations (ARGE)

Funds for bodies responsible for basic social security and the Federal Employment Agency (jobseekers) / Not evaluated

Opening up of WeGebAU [Weiterbildung Geringqualifizierter und beschäftigter älterer Arbeitnehmer in Unternehmen Further training for low qualified and older workers in companies] (further qualifications for employees) / Not evaluated

Prolongation of compensation for short-time working / Negative
Subsidies for those seeking to acquire qualifications while subject to short-time working / Negative
ESF funds for employment protection (obtaining qualifications while subject to short-time working) / Negative
Reimbursement of social contributions while subject to short-time working / Negative

One-sidedness of labour market policy measures: tailored to the needs of typical male sectors of the economy, they apply only to typically male employment forms, while measures for gender-neutral and typically

female employment forms and sectors were overlooked

Federal subsidy for statutory health insurance / Negative / Neutral with regard to the efficiency of statutory health insurance funds, negative with regard to financial room-to-manoeuve of public authorities in the area of the care economy

Joint task: structure of the regional economy / Not evaluated

Stepping up of investment in transport / Not evaluated

Future-oriented investments by public authorities / Neutral / Repairs instead of investment = no additional benefit for the care economy; presumably a lower proportion of funding for traditional areas of the care economy, evaluation provisional

One-off child bonus / Positive

Increase in standard children's rate SBG II and XII / Positive

Strengthening of purchasing power of persons caring for children

Environmental premium / Negative / Design narrows down target group to a predominantly male target group

Deductibility of trade services / Negative / Design narrows down support to typically male trades

Car tax exemption / Negative / Relatively greater relief for men in the male dominated target group; comparable consumption incentives for balanced groups of consumers lacking

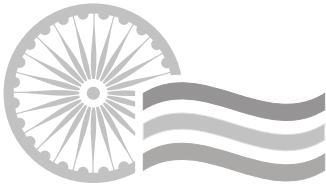
Changes in income tax / Positive / Affected by structural discrimination; female dominated group strengthened

Revision of car tax / Positive / Female minority of target group tends to benefit more

Tax depreciation allowances for small and medium-sized enterprises / Not evaluated

Regressive depreciation of movable business assets / Not evaluated

Sustainable financial policy for future generations (Debt limitation rule) / Negative / Massive cuts are to be expected in the area of the care economy; increase in burden on unpaid carers and providers / Unspecified



Financial support

Equality policy evaluation

Main reason for evaluation

Proportion of the budget for the given type of expenditure

KfW Programme for refurbishment of energy systems in buildings

Topping up of KfW Programme for municipalities / Procedures negative / Informalisation of allocation favours men and discriminates against women

Special fund for energy efficiency in small and medium-sized enterprises / Not evaluated

Promotion of innovation among SMEs (Innovationsförderung Mittelstand or ZIM) / Not evaluated

Innovation support (ERP Enterprise resource planning) / Not evaluated

Support for applied research / Not evaluated

Funding for broadband infrastructure / Negative / Limited exclusively to typically male employment possibilities; equality policy resonance ignored

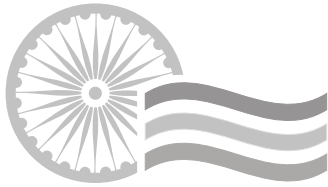
KfW Special Programme for SMEs

KfW Special Programme for larger companies

Federal guarantees

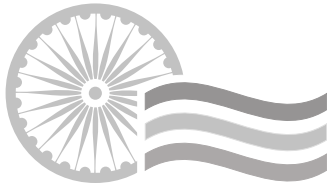
Procedures negative / Composition of decision-making bodies of the Germany Fund: almost solely men, only western German; primarily representation of manufacturing industry

Export financing



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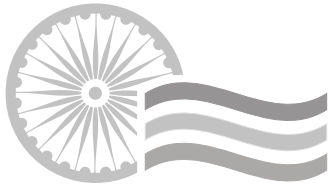
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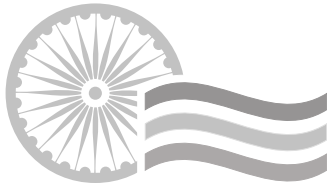
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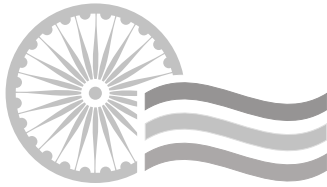
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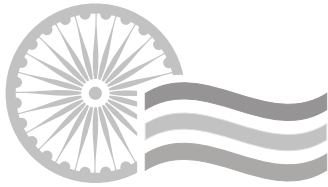
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about the author

Dr Mara Kuhl

Is an adviser of the public administration and political institutions. One key focus of her work is the integration of gender mainstreaming in reform provisions and work routines. As a freelance researcher she is active in applied research and heads the Berlin Berliner Geschäftsstelle of the GSF e.V. (Gesellschaft für Sozialwissenschaftliche Frauen- und Genderforschung Society for Women's Studies and GenderResearch in the Social Sciences).

Dr. Kuhl studied political science, economics and philosophy and has a diploma in gender research and a doctorate in administrative science.

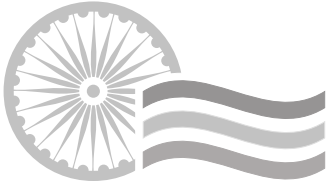
Contact: kuhl@fg-gender-main.de

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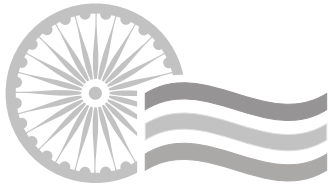
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