

## PARTICIPATORY BUDGETING AND THE REDUCTION OF SOCIAL EXCLUSION

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**Purpose:** The main purpose of this article is to identify solutions implemented in different countries within the PB processes to include marginalized groups and individuals, and to indicate possible directions of change in Polish participatory (civic) budgets.

**Design/methodology/approach:** The research employed three distinct methodological approaches: source analysis, comparative analysis, and simple descriptive analysis. The latter two were employed in conjunction with the former, with the former serving as the primary analytical tool. The research drew upon two primary data sources: the Participatory Budgeting (PB) project databases provided by the International Observatory on Participatory Democracy (IOPD) and Participedia. A total of ten projects were selected for analysis. The analysis focused on defining the stated aim (or set of aims) of the project, identifying the group of beneficiaries, and examining the methods and activities employed in the project.

**Findings:** The fundamental issue confronting the majority of Polish civic budgets (as a consequence of legal stipulations) is the assumption of uniformity within a given local community. As evidenced by the illustrative examples presented in this article, a meticulously designed PB process can contribute to the reduction of social exclusion, primarily in the environmental, spatial and group dimensions. Consequently, in order to reduce social exclusion, it would be necessary to redefine at the statutory level the concept and objectives of participatory budgeting.

**Social implications:** The creation of solutions dedicated to specific groups within the framework of civic budgets would enable local governments to facilitate their active participation in PB processes. Moreover, it would ensure that marginalized people have access to public services tailored to their needs. This assumes that the participatory budget is also to fulfil its primary functions in Poland.

**Originality/value:** The problem of using participatory budgeting to reduce social exclusion is not addressed in the Polish scientific discussion. Therefore, this article is one of the few voices in signaling the possibility of using foreign experience in this area in Poland and the need for changes in current legal regulations.

**Keywords:** public participation, participatory budget, social exclusion, case study.

**Category of the paper:** Case study, research paper.

## 1. Introduction

The problem of social exclusion and counteracting it has been present in world literature since the second half of the 20th century, while in Polish literature the problem appeared in the early 21st century. Despite such a long history of observation and research, there is no single, universally accepted definition of social exclusion. This is due to the complexity and multidimensionality of this process. It is often pointed out that this concept includes the lack or deprivation of resources, rights, goods and services and the inability to participate in the normal relations and activities available to the majority of people in society, whether in the economic, social, cultural or political arena (Levitas et al., 2007, p. 25). Thus, two approaches to explaining social exclusion are evident here - participatory and distributive (Klimczak et al., 2017, p. 11). From the point of view of this article, one of the most relevant areas of social exclusion is the relegation of a part of society from the opportunity to participate in social activities, which may also translate into a limitation in access to public goods. The very concept of public participation has received much attention in the literature (Arnstein, 1969; Connor, 1988; Langton, 1978). The general idea of public participation is to involve citizens in the processes of co-determination in matters that affect them. As Swianiewicz (2012, pp. 36-38) notes - broad citizen participation in state activities is desirable because of the functions it performs - educational (increasing citizens' knowledge and awareness), legitimizing (increasing oversight of government actions), integrative (strengthening local communities) and deliberative (enabling discussion). However, the degree of inclusion depends on the tools and processes proposed by the authorities. Typically, 3 levels of citizen participation are indicated: non-participation, tokenism and citizen power (Arnstein, 1969). The determinant of the qualification of a given form of interaction between authorities and citizens is the expected influence of participating residents on the final decisions of the authorities (Aziz, Shah, 2021; Rowe, Frewer, 2005). In practice, the effect expected by residents in the form of better adaptation of public services to the needs reported by residents is also very often emphasized (Boulding, Wampler, 2010).

One form of public participation that has spread widely around the world is participatory budgeting processes. Goldfrank (2021), analyzing the evolution of participatory budgets (PBs) globally, indicated that PBs were seen as a way to give a voice to the excluded, encourage the development of civil society organizations, make infrastructure and service delivery more equitable, and increase transparency while reducing corruption. In his view, they were even equated with a "magic bullet" to deal with numerous democratic and development deficits. This was largely due to the pioneering experience of implementing PB processes in Brazil (Cabannes, 2004).

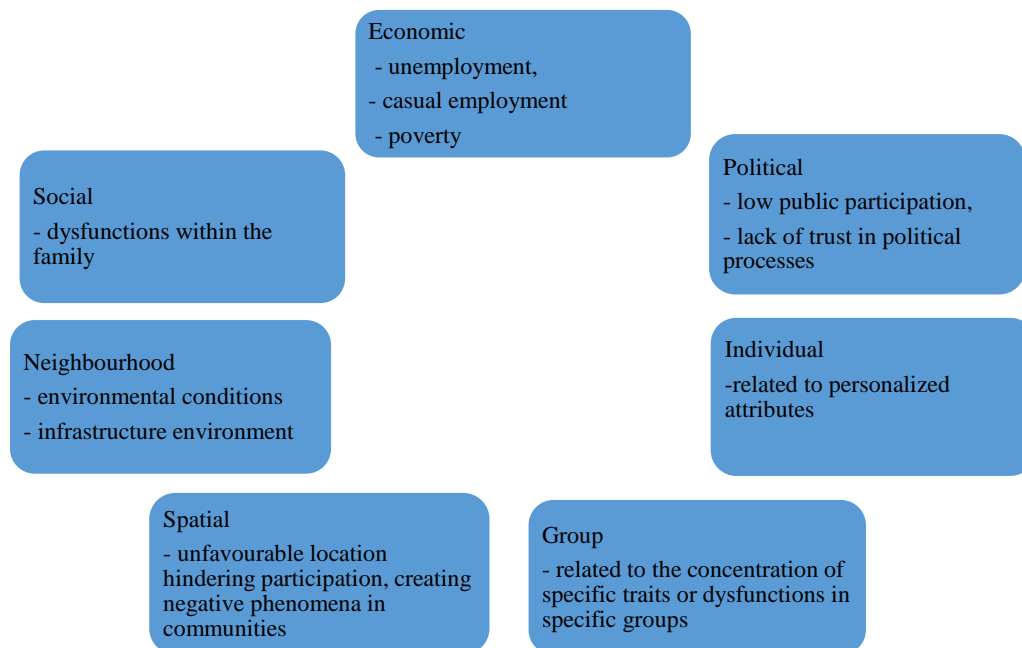
As mentioned above - as one of the important areas of influence of PB can be indicated widely understood social exclusion. The main purpose of this article is to identify solutions implemented in different countries within the PB processes to include marginalized groups and individuals, and to indicate possible directions of change in Polish participatory (civic) budgets. This is because the observed experience of other countries, as well as theoretical considerations suggest PBs can contribute to reducing social exclusion in two ways. Firstly - thanks to them, marginalized people and groups can gain access to public goods, as a result of identifying needs in the PB process. Secondly - thanks to the potential inclusiveness of PB processes, there can be activation of these people resulting in their “return to society”, exercise of rights and agency. However, a prerequisite for achieving such effects is the proper design of the PB process. It should be noted that despite the indication in the Polish literature of the inadequacies of PB processes, the discussion of possible directions of modification has not been more widely undertaken (Poniatowicz, 2014). Both in the Polish scientific literature and in practice, participatory budgeting in developed countries is identified more with a tool for better allocation of public funds than with an actual tool for active involvement of residents in public management (Brzeziński, 2021, p. 127). This is largely due to the replicated and legally entrenched formula of the Polish civic budget based on a “plebiscite” selection of projects skipping the phase of broad discussion among stakeholders (Pistelok, Martela, 2019). In view of the purpose of the article, the source analysis method, the comparative method and the simple descriptive method were used as the research method in the article. In the research, PB project databases provided by The International Observatory on Participatory Democracy (IOPD) and Participedia (a global crowdsourcing platform for public participation and democratic innovations) were used. In the research process, 10 projects were selected for which an analysis was carried out of descriptions from the IOPD and Participedia websites, award proposals documentation, reports and individual websites of the entities implementing the selected projects (if any). The analysis concerned the definition of the stated aim (or set of aims) of the project, the group of beneficiaries and the methods/activities used in the project.

## **2. Social exclusion**

According to the European Commission's definition (EU Commission, 2004, p. 10) “social exclusion is a process whereby certain individuals are pushed to the edge of society and prevented from participating fully by virtue of their poverty, or lack of basic competencies and lifelong learning opportunities, or as a result of discrimination”. It should be noted that social exclusion does not mean poverty at the same time. It is pointed out that the process of exclusion itself results not only in excluded people being removed from earning opportunities, but also from education or from opportunities to participate in community activities. Excluded people,

as a result of limited access to power and decision-making bodies, may feel powerless and unable to take control of decisions that affect their daily lives (EU Commission, 2004, p. 10). The enormous complexity of the problem of the extent of social exclusion should be pointed out here. For example, an analysis of EU social policy documents (Peace, 2001) revealed as many as 15 identified types of exclusion.

In Polish scientific literature, apart from author's definitions - e.g. Jarosz (2008, p. 8) for whom social exclusion “[...] means living outside the rights and privileges of society and a stratification feature of certain communities, shaped by their place in the social structure, past life experiences, expectations and power politics” - there are often attempts at a descriptive approach to social exclusion. The most frequently cited of these is Grotowska-Leder (2005, pp. 28-32), who divided definitions into: analytical (characterization of selected features), working (operationalizing the category for the purposes of conducted research) and official (contained in official documents). It is also common for authors of analyses to refer to the main dimensions of exclusion. For example, the oft-cited Percy-Smith (2000, p. 9), systematizing the output of British authors, points to seven main such dimensions (Figure 1).



**Figure 1.** Main dimensions of social exclusion

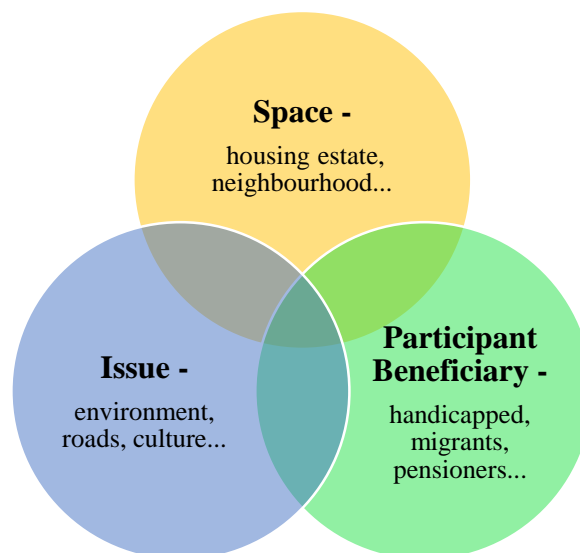
Source: Based on the Percy-Smith classification (Percy-Smith, 2000, p. 9).

### 3. Public participation

Public (civic) participation in governance involves the direct or indirect involvement of interested individuals in decisions about policies, plans or programs in which they have an

interest (Quick, Bryson, 2016). It is vertical in nature – “concerned with the involvement of individuals in the activities of the structures and institutions of a democratic state” (Kaźmierczak, 2011) and should be distinguished from social (horizontal) and individual participation. As defined in the Global Encyclopedia of Public Administration, Public Policy, and Governance (Lee, Sun, 2017), the purpose of public participation is to enable participants to take action and be heard in decision-making processes, ultimately influencing the final outcome. As Young (1990, p. 116) points out, participation enables, in a democratic state, all active citizens, with their “geographical, ethnic, gender and occupational differences”, to present their positions within the framework of solutions that the state proposes to them.

One possible form of public participation is the aforementioned participatory budgeting. In its broadest sense, it is a process in which members of the community, rather than elected officials, decide how to allocate public funds. Its origins date back to 1989 when it was first introduced as a grassroots initiative by residents in Porto Alegre, Brazil (Cabannes, 2004). Its dynamic spread in many countries has meant that there is no uniform model for this process, as its form has been adapted to the specificities of each continent, country, region or local community. Six models are usually mentioned, as identified by Sintomer and his team (2008) in their study. These models differ in terms of the origins of the process, the organization of meetings the type of deliberation or the place of civil society in the procedure. Cabannes and Lipietz (2015), on the other hand, indicate that participatory budgets can be classified differently. From their point of view, the basis for the division is one of the three criteria considered in the creation of a given budget - space, main beneficiaries (recipients) and issues.



**Figure 2.** Alternative classification of participatory budgets.

Source: Based on (Cabannes, Lipietz, 2015).

In practice (also in Poland), most participatory budgets are based on territorial assignment to a given space (Cabannes, Lipietz, 2015). This implies an assumption of relative homogeneity of the needs of a given local community - the (active) majority indicates the main needs.

Another approach is budgets created to solve a specific type of “problem”. Consequently, it is the local authorities that identify the priority areas within which they are willing to give up some decision-making powers to the residents. Of course, a combination of the above approaches is not uncommon. However, there is a third, definitely rarer, approach to the creation of participatory budgets, in which a key role is played by the identification of actors (in particular socially excluded groups). Individual sections of the PB are dedicated to them. The identification of these groups can refer to the expected participants on the one hand and the expected beneficiaries on the other. This means that issues of inclusion or counteracting social exclusion will appear next to territorial or thematic cohesion.

How, then, do the solutions applied in Poland compare to this above mentioned solutions? The evolution of Polish participatory budgets (called “civic” budgets according to the law) can be divided into two stages, with the turning point here seeming to be the introduction of legal norms on the functioning of the civic budget as a specific form of social consultation (Pistelok, Martela, 2019). In the first stage, due to the lack of detailed legal regulations, local governments looked for their own patterns of the process, which led to the development of various solutions adequate to the needs and expectations of the local communities concerned (Bednarska-Olejniczak, Olejniczak, 2018). Some of the participatory budgets of that period took into account not only the territorial aspect, but also the beneficiaries (youth budgets) and the diagnosed problems (revitalization, transport or “green”). However, the changes resulting from the statutory regulation of the general principles of PB (including the necessity of voting as a form of selection and the restriction to the possibility of dividing the budget into territorial pools, usually settlements) did not lead to the unification of participation processes and the total exclusion of deliberation (Sroka et al., 2022). Instead, they have overwhelmingly given these processes a “plebiscite” formula (Pistelok, d Martela, 2019). A few, such as Dąbrowa Górnicza or Gorzów Wielkopolski, instead come closer to the original concept of deliberation (Zawadzka-Pąk, 2019).

#### **4. Participatory budgets vs social exclusion**

From the point of view of the concept presented in the introduction of the use of participatory budgets as a tool for counteracting social exclusion in terms of access to public goods, it is essential to create budgets targeted at the identified problems of excluded groups in environmental, spatial or group dimensions. Table 1 presents an analysis of 10 implementations of participatory budgets concerning selected excluded groups or people. They are mostly examples of “good practice” proposed as exemplary, innovative solutions by IOPD.

**Table 1.***Analysis of features of selected PB projects dedicated to excluded groups and individuals*

<b>GeoSenior: Reporting vulnerable seniors (Portugal)</b> <b>Source: (IOPD, 2023a)</b>	
<b>Aim?</b>	The main objective is precisely to help vulnerable and at-risk elderly people. Through GeoSenior app, the knowledge that institutions have about the elderly in this area is strengthened, allowing greater adequacy of local responses to their needs.
<b>Who?</b>	The participants in the initiative are therefore, theoretically, all citizens of the community and, through their support, the institutions can act promptly for a healthier aging of senior citizens.
<b>How?</b>	A mobile app for 'whistleblowers' who should report (voluntary participation) problem situations when, among other things, the following are observed: the person becomes aware of a situation of difficulty or isolation, the person encounters difficulties in carrying out tasks of daily life, the person is living in a situation of grave economic need, if there is a difficulty in taking care of personal hygiene and clothing, apparent difficulty in carrying out housing hygiene etc.
<b>For a city of children: Lyon develops children's participation and gives them a voice (France)</b> <b>Source: (IOPD, 2023b)</b>	
<b>Aim?</b>	To give a voice to the children, the main beneficiaries and participants of the new project, in order to take into account their needs, expectations, dreams and desire for action.
<b>Who?</b>	Children between the ages of 4 and 15: mainly primary school pupils, as well as a few groups of secondary school pupils. Teams were also keen to involve pre-school children, making a special effort to adapt activities and themes. More than 700 children took part: sometimes groups of 5 to 10, sometimes whole classes.
<b>How?</b>	The approach was to be qualitative, to allow the children to express themselves freely. Opportunities for children to express themselves took the form of children's civic forums, debates and free discussions, and facilitators were creative in their facilitation techniques, using pictures and keywords, encouraging children to create posters on key topics or to express themselves through drawings, especially for the youngest children. Some facilitators even created video interviews or organised puppet shows to clarify issues and get children to respond.
<b>Virtual initiatives to guarantee citizen participation ... (Colombia)</b> <b>Source: (IOPD, 2023c)</b>	
<b>Aim?</b>	Platforms and virtual spaces for the inclusion of the rural sector and for the effective participation in participatory budgets of older people and people with disabilities. In addition to the project, it was proposed to: <ul style="list-style-type: none"> <li>- Achieve greater levels of equality when participating and incorporate diversity as an inclusion criterion.</li> <li>- Community strengthening.</li> <li>- The strengthening of unorganized citizenship.</li> <li>- Expand the rights of citizens related to political participation.</li> </ul>
<b>Who?</b>	Older people and people with disabilities and those who in general do not have technological skills given their educational context/process. Indirectly, it benefits the inhabitants of the municipality, who can make use of virtual resources to participate, despite the pandemic situation and social distancing measures for the preservation of public health.
<b>How?</b>	Virtual inclusion strategies for communities and populations that have limited access to the internet and virtual resources for participation: <ul style="list-style-type: none"> <li>- the creation of a technological-virtual system of citizen participation adapted to the needs of municipality for the continuity of participatory processes,</li> <li>- the "Inclusion Week" within the participatory budget elections was the strategy that guaranteed that people with disabilities and older people who reported having difficulties to vote virtually:</li> <li>- territorial virtual voting points,</li> <li>- personalized visits at home, for the participation of the elderly, people with disabilities and people with limited mobility.</li> </ul>

Cont. table 1.

<b>Youth Participatory budget (YPB) of Massamá e Monte Abraão (Portugal)</b> <b>Source: (IOPD, 2023d)</b>	
<b>Aim?</b>	The main objective of this practice was to empower unorganised citizens, namely young people.
<b>Who?</b>	Young people aged between 11 and 22.
<b>How?</b>	<p>Three co-creation sessions with 30 young people were carried out. They built, through a participative dynamic, the Rules of Participation. During a 4th session, the young people voted autonomously on the participation standards.</p> <p>In the proposal gathering phase, 458 young people participated in 13 "Parish Points" in which the young people (individually or collectively), were challenged to identify the problems of the parish, having presented, as solutions, 102 proposals.</p> <p>The technical analysis team, also composed of three young people, helped to decide, on the basis of the rules of participation, to validate 28 proposals.</p> <p>During the voting phase, 1251 young people voted and elected their 4 favorite proposals.</p>
<b>La Paz Neighborhoods and Communities Program (PBCV) (Bolivia)</b> <b>Source: (IOPD, 2023e)</b>	
<b>Aim?</b>	<p>In the neighbourhoods and communities benefited by the program, all neighbours learn to take care of their natural environment in campaigns of cleaning, afforestation, trash recycling.</p> <p>The program also promotes the development of human capacities with specific programs for each group of age.</p>
<b>Who?</b>	More than 110 000 inhabitants of the most depressed neighbourhoods of the urban area of the city and some rural communities.
<b>How?</b>	<p>Workshops were held and drills were organized so that neighbours learn to prevent risks and emergencies and contribute to citizen security.</p> <p>A citizen mobilization strategy is applied for the presentation of neighbourhood projects through a contest, in which only marginal neighbourhoods participate. Criteria are assessed such as: involvement of neighbours in the project phases, inclusion of women, proposal for comprehensive intervention (health, education, public roads, property law, green areas, risk prevention, etc.), technical feasibility and budget, among others. The contest is based on the participatory planning which encourages neighbours to commit themselves to the development of their community. Neighbourhood organizations conduct the collection of information to meet the requirements of the contest. At preinvestment stage – local assemblies are held to identify community requirements. Neighbourhood organizations monitor the process through works committees, identify "deviations" and propose solutions to the difficulties that may arise.</p>
<b>Participatory Budgeting as Prisoner Reintegration (Canada)</b> <b>Source: (Participedia, 2023)</b>	
<b>Aim?</b>	As an inclusive process of decision-making about collective needs and resources, participatory budgeting was envisioned as an opportunity to (...) contribute to a fuller reintegration of ex-prisoners. Through this process, all participants could not only further develop their civic capacities but gain the confidence and sense of empowerment that accompanies past participation.
<b>Who?</b>	Ex-prisoners living in the community (whether within transition houses or independently), current prisoners on Escorted Temporary Absences from local penitentiaries, volunteer community members, and organizational staff. In total, the process involved approximately 60-65 unique participants.
<b>How?</b>	<p>Process proceeded in three stages, including:</p> <ul style="list-style-type: none"> <li>- A large-group session dedicated to and introductory presentation, deliberations regarding possible projects (participants broke out into smaller groups of 4-5 individuals to discuss and record project ideas), and proposal collection;</li> <li>- A project committee (five-member committee representing the spectrum of stakeholders) stage to refine and develop initial proposals as well as plan the final exposition and vote;</li> <li>- A large-group session dedicated to an exposition of the finalized proposals, further deliberation about which projects ought to be funded, and the final voting process. Participants were provided with ballots which listed the nine projects and their costs, and provided space for individuals to allocate their assigned funds as they wished.</li> </ul>



Cont. table 1.

<b>Participatory budgeting for disabled persons employment promotion (Taiwan)</b> <b>Source: (IODP, 2016; New Taipei, 2023)</b>	
<b>Aim?</b>	Placing special focus on people with disabilities that are traditionally non-participatory and at risk of social exclusion, the case aims to achieve the followings: Social inclusion: principle "Nothing about us, without us" by adopting democratic deliberation, thereby voices of disabled individuals and stakeholders can be expressed and respected, and most importantly, determine budget allocation and policy devising to meet actual needs. Better governance: The bottom-up decision-making process ensures policies with a solid public base and optimizes the use of taxpayers' money. Public trust: Empowered citizens will assess a policy from the perspective of public interest rather than that of personal interest.
<b>Who?</b>	The total number of participants reached 1,000. This number accounted for roughly 50% of all persons with disabilities in this area. The voting rate reached 14.2%. The voters included persons with disabilities and their family members. Voters with mild impairments account for 50%, with the other 50% being individuals with medium or serious impairments. Male voters secured a higher share of votes than female. More unemployed voters participated in the voting than the employed.
<b>How?</b>	The process consists of four stages: (1) brainstorming (2) making proposals (3) voting, and (4) execution and monitoring. An executive committee was established since the beginning. It comprises 5-7 experts from multiple fields, including budget allocation, PB promoting, community organizers, disability rights protection and local government. Two disabled individuals serve as committee members. The responsibilities of the committee include inspecting the executing progress, helping to produce feasible proposals, and monitoring the realization of selected plans. Discussion sessions - 3 sessions of town hall meetings (intended for collecting the opinions from disabled persons), 2 workshop sessions introducing PB basics to village chiefs and officers, 1 workshop for training volunteers and students, and numerous occasions for informal opinion exchange organized by community members interested in this plan.
<b>Participatory Budgeting for Migrant Workers (on recreation activities) (Taiwan)</b> <b>Source: (IOPD, 2023f)</b>	
<b>Aim?</b>	<ul style="list-style-type: none"> <li>- To achieve higher levels of equality in terms of participation and to incorporate diversity as a criteria for inclusion.</li> <li>- To empower non-organised citizens.</li> <li>- To increase citizen's rights in terms of political participation.</li> <li>- To connect different tools of participation within a participatory democracy "ecosystem".</li> <li>- To improve the quality of public decision making through the mechanisms of participatory democracy.</li> </ul>
<b>Who?</b>	Target group consisted of South-East-Asian migrant workers who were living and working in Taiwan without citizenship and were both disadvantaged and being discriminated against in Taiwan. 149 persons during workshops (from 5 countries); 3049 persons in voting phase (from 5 countries).
<b>How?</b>	<p>Main activities:</p> <ul style="list-style-type: none"> <li>- Two targeted project seminars.</li> <li>- Two targeted proposal workshops.</li> <li>- PB voting.</li> </ul> <p>Additionally:</p> <ul style="list-style-type: none"> <li>- Multi-linguistic webpage on Facebook.</li> <li>- On-line exhibition of proposals (usage of mother tongues).</li> <li>- Face-to-face communication between public servants and participants.</li> <li>- After the proposals had been accepted, the public sector invited the proposers to participate in the implementation process, in order to ensure that their ideas and preferences would be properly realized.</li> </ul>

Cont. table 1.

<b>Gender Responsive and Participatory Budgeting (Malaysia)</b> <b>Source: (IOPD, 2023g) (Kamarudin, 2014)</b>	
<b>Aim?</b>	Improving the living conditions of the community living in communal buildings - tailoring activities to the needs of a diverse community.
<b>Who?</b>	Dedicated to two groups of residents in buildings with low-cost rental housing - owned by the city. Specifically considering age, gender, nationality, disability. Mainly non-working (50%) and manual workers, multicultural and multinational community.
<b>How?</b>	Four action phases: 1. Surveys to identify the structure of the community (with the support of local residents' groups) - who are we? 2. Collection of ideas: - Focus Groups. What are OUR needs? Target Communities: Children & Teenagers (18 yrs & below), Youth (19-30 yrs), Adults (31-55 yrs), Senior Citizens (56 yrs & above), Disabled People. - Education & Awareness of Our Needs (involving awareness raising through i.e. walks, discussions)- identification of needs based on focus groups and joint project development with residents. 3. Voting by means of gender and age vouchers. 4. Commitment to implementation (co-production).
<b>Humanizing the Budget Process (USA)</b> <b>Source: (IOPD, 2020)</b>	
<b>Aim?</b>	1. Projects that serve the most marginalized communities are implemented as a result of this process. 2. Build greater equity throughout the City of Durham by allocating resources in ways that correct past harm. 3. Engage more diverse populations in making decisions about how resources are used. 4. Increase overall engagement in decision making in the city of Durham.
<b>Who?</b>	Any Durham resident over the age of 13 (over 10 000 participants at voting stage).
<b>How?</b>	The strategy consisted of identifying underserved communities based upon median income and also racial makeup. The innovative aspect to this approach was to "meet people where they are". This approach was extremely vital when speaking with these communities regarding the needs in their communities. Phase 1 - A variety of community outreach events in the form of community meetings, festivals, and pop-up events at local schools and religious institutions to educate people about PB. Durham residents, in their designated wards, generated ideas about what their community needs were on the digital platform "Mapseed" - a mapping tool to help visualize the location of proposed projects. Phase 2 - The City of Durham wanted to ensure that residents were constantly part of the process, so they allowed residents to volunteer as Budget Delegates. 57 volunteers served as Budget Delegates and went through a series of trainings and data workshops to better prepare for the proposal development phase. to determine feasibility according to the specified guidelines: 1) Community need, 2) Project impact, 3) Equity, and 4) Cost. Phase 3 - residents had 31 days to vote from a short-list of proposals (those deemed feasible) they believed should be funded in PB in their designated ward. Voting assemblies, pop-up voting tables, and canvassing community events and door-to-door canvassing ballots were utilized to encourage voting participation in each ward.

Source: Own work based on projects websites.

As can be seen, the objectives of each project were defined in a differentiated way, which was due to the specificity of the group to which the PB was dedicated. One can see objectives directly related to the provision of public services and improving the quality of life (La Paz, Taipei, GeoSenior) as well as those related to building social ties (Massama e Monte Abraao) and educating and involving the community (migrants, prisoners, kids). The identification of specific groups to which the analyzed PB processes are dedicated includes the identification of narrow groups of participants and beneficiaries (prisoners, people with disabilities) as well as broad groups of project beneficiaries (elderly people, children, residents of the territory).

In the case of broad groups (residents of a given settlement), there is also a visible effort to take into account the diverse needs of individual groups of residents (e.g. to include an additional division for different age ranges).

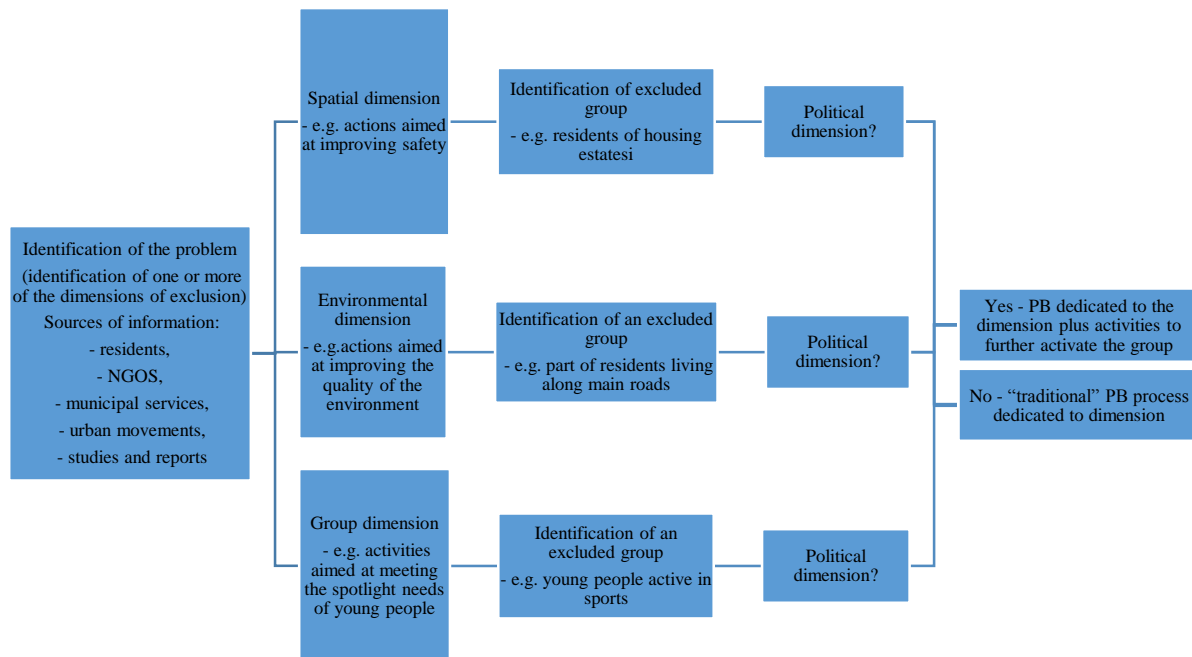
The spectrum of activities is very broad and to a large extent individually tailored to the specific characteristics of the target group. Important in the case of marginalized groups in the practices discussed here is the direct outreach to their members, the “face-to-face” contact, and the adaptation of the participation process and tools to the specifics of the group.

One example is Taiwan's “Participatory Budgeting for Disabled Persons Employment Promotion in Sanxia District” (New Taipei, 2023). The procedure involved both scientific and practical familiarization of authorities and project proponents with the conditions of persons with disabilities in the district, the widest possible inclusion of persons with disabilities in the preparation of proposals (half of their population eventually participated), cooperation of NGO actors in the preparation of projects, in-depth open discussions and presentations of proposals, and voting (in a disability-friendly environment). It was also important to reach all potential participants with information – “mailing all of the introductory and promoting materials - even voting notices - directly to participants’ mailboxes” (New Taipei, 2023).

The La Paz Neighbourhoods and Communities Program (IOPD, 2023e), on the other hand, introduced a PB component in 2015 for more than 300 neighborhoods and more than 50 rural communities with the highest poverty rates of the municipality of La Paz (Bolivia). Neighborhood collaboration played a central role in all stages of the program - from identifying neighborhoods to interventions, planning activities, allocating budgets and overseeing the implementation of the work. Other areas of action are set in countries with higher levels of development. In Durnham (USA), the aim of the PB was, among other things, to implement projects to serve racially excluded communities, to increase equity among residents (IOPD, 2020). Importantly, in identifying areas concentrating excluded groups, spatial data analysis was used creating “heat maps” to reach these communities where they are and enable them to participate in the design and selection of projects.

Participatory budgets targeting young people are very popular around the world. Examples are both foreign e.g. Boston Youth Participatory Budgeting (IOPD, 2023h), Tampere or Polish e.g. in Lublin (Lehtonen, Radzik-Maruszak, 2023). What is important here, however, is the way in which excluded people are included - in the case of Boston and Tampere, youth inclusion consisted of allowing young people to submit proposals, whereas in Lublin the aim was to tailor projects to the needs of young people, and the projects themselves were also submitted by NGOs, schools or kindergartens (Lehtonen, Radzik-Maruszak, 2023). Foreign literature on PB also devotes attention to processes aimed at including women in these processes, as gender exclusion is a worldwide problem that many authors have recognized (Allegretti, Falanga, 2016; McNulty, 2015; Ng, 2016).

It should be noted that, depending on the specific characteristics of the excluded group, appropriate solutions are selected to reach the group and obtain feedback (adaptation of the language of communication, use of local support groups, facilities for the disabled, gamification, forms of presentation of views, civic education). Surprisingly, one of the processes whose beneficiaries are older people did not require their direct participation (GeoSenior) and therefore did not concern the activation of their attitudes towards PB. Examples of the relationship between the dimensions of exclusion and PB processes are presented in Figure 3.



**Figure 3.** Dimensions of exclusion vs. participatory budgeting processes.

Source: Own work.

By contrast, given the problem of reducing political exclusion, PB faces a much greater challenge. McNulty (2015) points out that despite an increase in research on PB, there is still “little known” about the extent of the inclusiveness of the process. Contradictory assessments of achieving the goal of mobilizing excluded groups are also apparent (Dajer, 2023; Johnson et al., 2023; Schneider, Busse, 2019). Nevertheless, in order to achieve mobilization, it seems to be important to obtain answers to the question of why the individuals (groups) in question do not participate. Verba, Schlzman and Brady (1995) point out that this may be due to existing limitations (material, cultural...), a lack of willingness or a lack of awareness of the possibility to take part (and the possible positive consequences). This means that, in addition to the standard PB promotion activities, there is a need to reach out directly to individual/excluded groups and convince them to participate (the case of Sanxia, La Paz, where efforts were made to reach the majority of excluded people). Wampler (Wampler, 2007) emphasizes that an important role in mobilizing excluded people must be played by third sector actors and

informal groups because it is their staff/volunteers who know these communities best and are able to convince disengaged people.

## 5. Conclusions

In conclusion, it is necessary to stress that the signaled problem is worth a deeper analysis, the results of which should be one of the premises for a discussion on modifying the legal regulations concerning PB in Poland. The basic problem of most Polish civic budgets (resulting from legal regulations) is the assumption of homogeneity of a given local community. This results in marginalized individuals and groups facing various types of barriers limiting their participation in PB processes (Sroka et al., 2021). It therefore seems necessary: (1) to redefine at the statutory level the concept and objectives of participatory budgeting, (2) to increase the independence of local governments to decide on the distribution of PB funds to dedicated pools of funds for particular groups of residents, (3) to shift away from voting as the main form of activity of the majority of residents within the PB to deliberation, co-creation and co-production of public services within the PB process.

As indicated in this article by the examples presented, a properly constructed PB process can contribute to the reduction of social exclusion primarily in the environmental, spatial and group dimensions. Enabling local governments to create solutions dedicated to the above-mentioned people and groups (seniors, children, youth, migrants) within the framework of civic budgets would, on the one hand, create an opportunity for their active participation in PB processes and, on the other hand, provide them with access to public services “tailor-made” for them, assuming that the participatory budget is also to fulfil its “primary” functions in Poland. It is also important to be able to use the civic budget as a tool for (citizen) education of all the groups mentioned and for creating bonds in local communities. Increasing the importance of cooperation of members of a given community at the stage of analyzing problems, generating ideas and verifying their feasibility seems to be indispensable for limiting social exclusion of part of the population. In large cities, this may mean moving away from city-wide projects to local actions in which the participation of the local community at each stage of the participatory budget is an important criterion for the project.

As noted in the case of using PB to reduce social exclusion, reaching out to members of excluded groups and involving them in the PB process can play an important role. At the same time, one should be aware that this may require the inclusion in the PB process of activities that are rarely used in Polish participatory budgets, usually as separate solutions from the statutorily regulated civic budget.

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