



NORWEGIAN MINISTRY  
OF CHILDREN AND EQUALITY

Guide

# Guide to gender equality assessment and discussion in ministry budget propositions



# **Guide to gender equality assessment and discussion in ministry budget propositions**

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## **1 – INTRODUCTION: WHY CARRY OUT GENDER EQUALITY ASSESSMENTS IN BUDGETING PROCEDURES?**

There are still great differences between women and men with regard to political and financial participation, pay, income and wealth, and caring and housekeeping work in the family. The target of full equality between women and men in all sectors of society has not been reached. The Government will therefore seek to step up the work of integrating the gender and equality perspective in all policy and budgeting fields. Since 2002, special attention has been paid to the Fiscal Budget. If they are to produce results, aims and measures to promote equality must be supported with resources.

The Act relating to Gender Equality enjoins all public authorities to make active, targeted and systematic efforts to promote gender equality in all sectors of society.

Public authorities shall make active, targeted and systematic efforts to promote gender equality in all sectors of society.

*Section 1 a of the Gender Equality Act. Duty to promote gender equality.*

The United Nations Convention on the Elimination of All Forms of Discrimination against Women directs the parties to the convention to take all appropriate measures, in particular in the political, social, economic and cultural fields, to ensure the full development and advancement of women.

States Parties shall take in all fields, in particular in the political, social, economic and cultural fields, all appropriate measures, including legislation, to ensure the full development and advancement of women, for the purpose of guaranteeing them the exercise and enjoyment of human rights and fundamental freedoms on a basis of equality with men.

*The UN Convention on the Elimination of All Forms of Discrimination against Women, Article 3*

At the United Nations Fourth World Conference on Women held in Beijing in 1995, the global community agreed to call on national governments to review and if necessary change the distribution of public resources, to ensure that women and men benefit to the same extent.

Governments should make efforts to systematically review how women benefit from public sector expenditures; adjust budgets to ensure equality of access to public sector expenditures, both for enhancing productive capacity and for meeting social needs; and achieve the gender-related commitments made in other United Nations summits and conferences. To develop successful national implementation strategies for the Platform of Action, Governments should allocate sufficient resources, including resources for undertaking gender impact analysis.

*Beijing Platform for Action, article 347*

### *Objectives of the work*

Integration of the gender and equality perspective in the Fiscal Budget is intended to contribute to equitable distribution and targeted and efficient use of public resources, and to ensure that all the various policy sectors are involved in promoting gender equality. Assessment of the gender perspective in the Fiscal Budget is intended to

reveal and document unwanted differences between the sexes and to facilitate targeted measures aimed at achieving real equality in all areas of society. This will also contribute to a qualitatively better and more realistic analysis. This is in line with the principles of good governance, and with the policy adopted for the modernization of the public sector, including appropriateness of action and user-friendly services and use of resources.

Gender equality assessment does not relate to budget and policy sectors in which gender equality is a principal objective, but to initiatives that have other primary objectives. Examples could be reforms, measures, or budget items in such areas as working life and industry, education, research, health, family affairs, etc.

Women and men have different situations in life, both in working life and in the family, a fact reflected in most social arenas. That makes it necessary to survey and consider which consequences reforms and measures have for women and men, in order to prevent unfortunate and unintended consequences. In many cases it would also be relevant for the analysis to take into account other variables, in particular ethnic background.

In the long term, the aim is for all parts of the Fiscal Budget to be examined for their relevance to gender equality, and for appropriations in all relevant areas to contribute to the reductions of undesirable differences. A study of the consequences for gender equality must make clear what significance a matter has for both women and men. It must also show whether, and in the event how, the reform affects relations between women and men.

#### *The gender equality annex*

The Ministry of Children and Equality wishes to have annual surveys and analyses carried out of how financial resources are distributed between women and men at the macro level. The reports will be submitted as annexes to the Fiscal Budget. The analyses supplement the more limited gender equality assessments prepared in the ministries' individual budget areas. The gender equality annex is meant to be an instrument with which to analyse and bring out the effects on distribution of the Fiscal Budget, and to provide indications as to where to prioritize efforts to even out unwanted differences. It provides useful reference data for more specific gender equality assessments in a number of policy and budget sectors.

The gender equality annex for 2005-2006 sheds light on the distribution of resources between women and men. The focus is on income, employment and time use. The report documents unacceptable differences in income between women and men, both in wages and earned income, in pensions, and in transfers from the authorities.

#### *Responsibility of the line ministries*

The work of integrating the gender equality perspective in the areas of responsibility of the individual ministries will be continued. All ministries will carry out gender equality assessments within their own budget areas. Accounts of the assessments will be given in the ministries' own budget propositions. The scope of the account will be up to each specialist minister.

### *The Guide – a tool for the ministries*

The Guide was drawn up by an inter-ministerial working party. It is a tool with which to plan and organize the work of gender equality assessment in the specialist budget areas, carry out gender equality assessment, and present and discuss gender equality in the special budget areas in the ministries' own budget propositions.

### **Definition**

Gender equality means that women and men, girls and boys, have the same opportunities, rights and duties in all areas of life.

This moreover implies equal rights to have and exercise influence, share responsibilities and burdens, and to recognition and rewards for effort. This entails redistribution of power and care. Values attached to caring must have the same status as technical and financial values (and rationality).

Gender equality builds on respect for human dignity for both sexes, irrespective of social or ethnic background, religion/faith, functionality, sexual orientation, or age. The reproductive rights of girls and women must be respected. Gender equality is incompatible with any form of discrimination, suppression, violence and violation. To reach the goal of real gender equality in all areas of life, we must involve and mobilise both girls and women, boys and men.

### **Paramount objectives**

- **The same opportunities and rights to participate in and exercise influence on decision-making processes in all social arenas.**
- **Genuinely equal opportunities to take paid work and achieve financial independence throughout life.**
- **The same responsibility, rights and opportunities where giving and receiving care are concerned, both in families and in institutionalised services. Caring and housework in the home must be shared between the sexes.**
- **Relations between the sexes must be based on tolerance, multiplicity and mutual respect for the physical and mental integrity of the individuals. Gender equality presupposes freedom from violence, sexual violations, exploitation, harassment and compulsion.**
- **Equal opportunities for education, for physical and mental activity, and for developing and using one's abilities and interests and fulfilling one's ambitions.**
- **Care for people shall be valued as highly as responsibility for technical and economic values.**

## **2 – THE ORGANIZATION OF GENDER EQUALITY ASSESSMENT WORK**

For the gender equality perspective to be thoroughly integrated in line ministry propositions, it is important for gender equality assessment work to be organized, firmly based, and structured in each ministry.

### **2.1 Basis in the regular budgeting procedure**

- The Budget Department of each ministry sees to it that gender equality assessment is planned and called for as part of the regular budgeting procedure.
- The Budget Department is also responsible for the presentation of a good account of gender equality in the specialist budget sections of Proposition no. 1 to the Storting.
- The departments responsible for special areas prepare (or order) gender equality assessments.

### **2.2 Basis in ministry leadership**

- The leadership of the ministry, in the person of the Secretary General, has the over-riding responsibility for initiating and monitoring the process, and ensures that it is firmly based in the management of budget and specialist departments.
- The senior staff of the budget department are responsible for seeing that regard for gender equality is rooted in the regular budgeting procedure.
- The senior staff of the specialist departments are responsible for establishing the necessary priorities and for mobilising the resources needed to carry out gender equality assessments in their own areas of responsibility.

### **2.3 Inter-sector cooperation**

The appointment is recommended of an inter-sector cooperation group with members from:

- the budget department
- the specialist departments
- supplemented with gender equality expertise
- consideration should be given to drawing on subordinate agencies.

The **task** of such a group will be related to the planning of the process (see ch. 3):

The group will be an active motivator and contribute to attracting attention to gender equality assessment work and to inter-sector cooperation.

## 2.4 Gender equality expertise

- The Ministry of Children and Family affairs (with effect from 1 January 2006 the Ministry of Children and Equality) can help with advice and guidance, but does not carry out gender equality assessments in other ministries' areas.
- Various external environments can assist in the implementation of particular gender equality assessments and with training programs (see ch. 7).

All ministries have gender equality contacts. Ministries should ensure the recruitment of the necessary gender equality expertise, call for and employ gender equality expertise where it exists, and see to the necessary training and competence internally.

## 2.5 Subordinate agencies

In many areas of policy, central instruments are delegated to subordinate agencies or operations. It will often be helpful to involve these as early as in the survey phase (cf. 3.1), and in the design and implementation of a gender equality assessment, or to give them specific assignments.

Ministries are urged to lay down clear guidelines concerning how subordinate agencies and operations, and lower levels of the administration, can best fulfil the duty to be active. The demand for a gender equality assessment must be contained in the letter of allocation and consistently communicated in the management dialogue. This can be done by including a special reference to Section 1 a of the Gender Equality Act. This general mention can be supplemented by integrating the gender and equality perspective in the discussion of the other guidelines the ministries lay down for strategic areas of their exercise of authority.

### **Activity duty**

The Gender Equality Act directs government authorities to make active, targeted and systematic efforts to promote gender equality in all sectors of society. This entails making direct demands for activities which promote gender equality. The duty applies not only to staff, but also to users, the public, and others affected by the authority's activity, for instance in the formulation of rules and statutes, in budgeting work, in allocations, and in political resolutions.

### **The activity duty entails:**

- finding out whether what one does or is planning to do has different impacts on women and men
- ensuring that what one does or is planning to do does not increase the differences between women and men
- taking steps which reduce the differences between women and men.

### **3 – PLANNING THE PROCESS**

The budget/administration department is responsible for initiating the planning of the process, but the initiative can also come from a sector department or from the gender equality contact. The first step should be to set up an inter-sector cooperation group to coordinate the survey phase, review the ministry's budget sector in the light of its gender relevance, and draw up and propose a work schedule.

#### **3.1 The survey phase**

The sector departments survey measures and analyses (under ministry management) that have a bearing on gender equality and are in place or ongoing in their respective fields:

- What experience has been gained?
- How have findings and proposals, if any, been followed up?
- Is there any relevant external R and D which the ministry can make use of in its work with gender equality assessment in its own areas?
- Are there gender-responsive statistics in the area?

#### **3.2 Assessment of relevance to gender**

- All the ministry's budget sectors are assessed in relation to the questions concerning relevance to gender.
- For each budget sector, a brief description is given of in what ways gender is relevant.
- Sectors where it is evident that gender is not relevant can be dismissed with a brief statement of the reason.

To determine when gender is relevant, the following questions are asked:

- Is the budget sector person-related?
- Will it affect the everyday lives of parts of the population?
- Are there differences between women and men in the sector (with regard to rights, resources, participation/representation, values and norms that affect gender-specific behaviour?)

If the answer to one of the questions is yes, the gender perspective is relevant.

To examine the gender relevance, gender-responsive statistics should be obtained to shed light on the sector in question.

When choosing a sector, one should consider whether the following factors may have different impacts on women and men:



- The challenges which the budget sector is meant to help to meet or in the event diminish
- The stated objectives of the budget sector
- The influence of the budget sector on the behaviour and decisions of the players.

### **3.3 Work schedule for gender equality assessment**

The cooperation group draws up a proposed work schedule and list of priorities for the implementation of a gender equality assessment in those of the ministry's budget sectors that show gender relevance (cf. 3.2). The result of the survey phase (cf. 3.1) is taken into account. The ministry's senior executive group orders the implementation.

The work schedule states:

- the scope of the planned assessments
- how the necessary organizational base, resources and expertise will be secured for the implementation
- a tentative prioritization among sectors needing assessments with longer time horizons.

To begin with, a few sectors can be selected, to be followed by an annual increase in the number/scope of the analyses. The sectors to be selected first are those where gender equality has obvious relevance or which are political priorities. More complex sectors can wait until some experience has been gained with the methods to be used, and the benefits to be gained from gender equality assessment have been seen. The position with regard to resources may also indicate making a modest start, while gradually building up a perception of the desirability of allocating more resources to gender equality assessment of new and more extensive budget sectors. The aim in the long run is for all gender-relevant budget items to be assessed.

The budget/administration department initiates an annual review of the plan

- to benefit in the continuing work from what has been learned from experience
- to set new measures in motion in accordance with the planned priorities
- to make any necessary adjustments to the plan.

## **4 – IMPLEMENTATION OF THE GENDER EQUALITY ASSESSMENT**

This chapter proposes methods and procedures for the implementation of a more comprehensive gender equality assessment. For a more systematic review of various methods and instruments, see ch. 7.

### **4.1 Define and delimit the sector/measure to be assessed**

A sector may be an overall sector, a delimited sector, or a grant scheme.

#### **Examples**

Overall sector: The National Transport Plan (the Ministry of Transport and Communications, ch. 3.5)

Delimited sector: Children and adolescents in the consumer society (the Ministry of Children and Family Affairs, Program category 11.30: consumer policy, ch. 865: measures of consumer policy and international cooperation).

Grant scheme: The value-creation program for food production (Program category 15.30: Industrial development, resource management and environmental measures, the Ministry of Agriculture and Food, ch. 1149 Value creation and development measures in agriculture).

### **4.2 Define the gender equality objectives for the sector to be assessed**

If there are no gender equality objectives for the sector to be assessed, one should begin by defining objectives in accordance with the overall gender equality objectives adopted (see p. 4). These may relate to:

- formal rights
- power and influence
- value priorities, conflicting values
- income, expenditure, financial status
- access to and use made of resources and goods
- freedom from violence, sexual violation, exploitation, harassment and compulsion
- responsibility and rights and opportunities for giving and receiving care
- time spent on paid and unpaid work
- opportunities to develop and use one's abilities and interests and fulfil one's ambitions.

Where appropriate the objectives formulated should specifically discuss women, men, boys, and girls.

## **Gender equality objectives – examples**

### National Transport Plan

- Men and women must have the same opportunities to participate in planning and decision-making in the transport sector.
- Investments must cater for both women's and men's transport needs/habits.

### Children and adolescents in the consumer society

- Training in handling personal finances must be adapted to the patterns of consumption of boys and girls.
- Boys and girls must be aware of how the sexes are depicted.

### The value-creation program for food

(The value-creation program for food had no stated gender equality objectives. The first step in the implementation of the analyses was accordingly to define the objectives.)

- To utilise both women's and men's potential in agriculture.
- The proportion of program funds to be granted to women must correspond to the proportion of women in the industry.

\* Except for the value-creation program for food, the examples are all fictitious. The food program was assessed by Fredrikkes Hage.

## **4.3 Define relevant indicators**

Indicators may relate among other things to representation, position, or distribution of resources in the sector under assessment.

### **Indicators – examples**

#### National Transport Plan

- numbers of women and men in different positions concerned with planning and decision-making
- use of infrastructure by women and men
- distribution of investments in each transport sector in relation to the proportion of male and female users

#### Children and adolescents in the consumer society

- levels of awareness among girls and boys
- the gender perspective in the ethical positions taken by the fashion industry
- ethical guidelines drawn up with a gender perspective

#### The value-creation program for food

- The proportion of program funds allocated to women in relation to the proportion of women in the industry

## **4.4 Choice of method and manner of implementation**

The method is chosen in the light of an assessment of:

- how extensive the sector is
- the objectives and indicators relating to gender equality

- what quantitative and qualitative data are available.

See also Chapter 6 on methods, pages 15 ff..

### **Method – examples**

#### National Transport Plan

Order gender-responsive statistics which show women's and men's transport habits

Order gender-responsive statistics which measure the satisfaction of women and men with the transport facilities available

Carry out a quantitative survey of women's influence on planning and decision-making

- gender distribution among case-handlers
- gender distribution among decision-makers
- gender distribution in management groups
- involvement of both women and men in the planning process

#### Children and adolescents in the consumer society

- investigation of attitudes with a gender perspective among adolescents
- incorporate gender in ethical guidelines
- incorporate gender in the school curriculum

#### The value-creation program for food

A 3R analysis of how instruments are divided between women and men

- gender distribution of applicants
- gender distribution among fund managers
- volume of support granted, by gender of applicants
- analysis of the reasons for uneven distribution, if any, between the genders

Who is to carry out the assessment depends on prioritization of resources, time available to case-handlers, the competence available, or the finances available to pay for assistance from external consultants:

- the ministry can order gender-responsive statistics
- the ministry can make use of existing R and D
- the ministry can carry out the analysis (which means setting aside the necessary time)
- the ministry can request a subordinate agency to carry out a gender equality assessment
- the ministry can appoint external consultants to assess a sector

### **Implementation – example**

The Ministry of Agriculture<sup>1</sup> requested the Norwegian Industrial and Regional Development Fund<sup>2</sup> to assess value-creation programs. The Fund gave the assignment to the Information Centre on Gender Equality Fredrikkes Hage.

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<sup>1</sup> With effect from 01.10.04, the Ministry of Agriculture and Food.

<sup>2</sup> With effect from 01.01.04, Innovation Norway.

#### **4.5 How can the assessment be followed up?**

Decide whether the results of the gender equality assessment/analysis indicate a need for changes in the statement of objectives for the sector/measure, the criteria for allocations, routines, or other changes, with a view to correcting any undesirable imbalances. Consider the results in the light of Government policy and gender equality objectives.

## **5 – DISCUSSION IN SECTOR BUDGET PROPOSITIONS**

All ministries must consider the gender and equality perspective in the sector-specific parts of their budget propositions. The formulation and scale of the discussion will vary and be adapted to the ministries' portfolios. It may be to the purpose for the discussion to accord with the following outline:

### **5.1 Introductory discussion.**

Discussion of equality in sector budget areas should be gathered together, for instance:

- in the introductory section (chapter 1)
- in connection with the mandatory account of gender equality internally within the unit
- together with other cross-sector themes

Gender equality in budget sectors can be presented as follows:

- A brief analysis of the ministry's sector and budget areas from a gender perspective.
- A description of the ministry's working schedule for gender equality assessment in the budget categories where gender is relevant.
- A brief introduction to gender equality assessment in selected budget areas, giving references to the relevant sector chapters.

### **5.2 Specific discussion.**

In all budget areas that have been defined as gender-relevant, the ministry should seek in the sector chapter:

- To see that all person-related statistics, tables and diagrams are divided by gender.
- To ensure that gender appears prominently, among other things by using designations which clearly show that the target group consists of women and/or men, girls and/or boys.
- To state the gender distribution in the target group/population groups concerned. Other distinguishing features of the target group/population groups concerned, such as ethnic background etc. may also be relevant.

### 5.3 Discussion of more comprehensive gender equality assessments

In the discussion of budget sectors that have been the objects of more comprehensive gender equality assessments (cf. ch. 4), the ministry should adhere to its regular budget outline, for instance:

- Reporting results: what findings have been made?

#### **Example**

The gender equality assessment of the value-creation program for food indicates that fewer women than men avail themselves of the value-creation program, but that the proportion of women who participate is higher than the proportion of women engaged in the agriculture industry. Consideration could be given to adapting the information on the program better for women.

- Description of the situation: what challenges does the sector present? (Cf. objectives and indicators for equality, sections 4.2 and 4.3, pp. 9-10.)

#### **Example**

Description of the proportion and the relevant characteristics if any of women in the industry. Reveal whatever obstacles there may be to women's participation in food production. Suggest ways of increasing the number of female applicants for value-creation funds.

- Targets and strategies – measures: how should the findings be followed up? How do the findings affect targets and strategies in the sector?

#### **Example**

##### Interim target:

To increase the proportion of female applicants for value-creation funds.

##### Final target:

The proportion of instruments allocated to women must at least correspond to the number of women in the industry.

##### Measure:

Issue special information on the instruments so as to motivate more women to apply for value-creation funds.

## 6 – METHODS OF GENDER EQUALITY ASSESSMENT

The present chapter presents a selection of methods which have been used in gender equality assessments both in Norway and in Sweden.

### 6.1 3R<sup>3</sup>

The 3R-method was originally developed by the Swedish researcher Gjertrud Åström for the Swedish Association of Local Authorities (corresponding to the Norwegian Association of Local and Regional Authorities).

The 3R-method is a systematic review of an activity in a gender perspective. The method is used on the one hand to **show who formulates and takes part in establishing the premises for the service**, and to discuss what bearing this has on the nature of the service. On the other hand it is a matter of **revealing patterns in how women and men obtain shares in the activity's resources – who gets what on which conditions?** The 3R-method entails three steps, each of which tells us something about equitable distribution of resources.

1. **R1 – Representation:** How many women and how many men benefit from the service/activity? How many women and how many men take decisions, define the premises for, or have day-to-day responsibility for the form resource allocation takes in an activity?
2. **R2 – Resources:** How much of the resources do female and male users respectively receive?
3. **R3 – Reality assessment:** What questions does this raise about equitable distribution of resources?

#### **R1 Representation: How many women and how many men?**

The first part of the analysis is a numerical description of the representation of women and men in the service. Distribution by gender is studied among **users, decision-makers, definers of premises** and **providers of services** at different levels. This is a question of studying and showing who *formulates, lays down the premises for, and provides the service* on the one hand, and who *uses the service* on the other. Depending on which service one is examining and what one's focus is on, one can ask such questions as:

- Are there systematic differences between the female and male users, for instance in age, status, resources, patterns of behaviour, wishes, needs or priorities?
- How many women and how many men are there in the political decision-making process? What are their positions?
- How many women and how many men are employed in the operation? What are their positions?
- How many women and how many men receive or use the service?

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<sup>3</sup> The presentation is based on "Kjønnsperspektiv i tjenesteproduksjon og planlegging – Veileder" (the gender perspective in service production and planning – Guide), Bergen, June 2003, written by Renate Storetvedt Lien and Arnhild Taksdal, the Stein Rokkan Centre for Social Studies, the University of Bergen.



## **R2 Resources: How are the operation's resources distributed?**

The second part of the analysis is a numerical description of how the resources of the service (for instance in the form of money, time, space or competence) are distributed and made use of in relation to women and men. This question can also be put in respect of those who contribute to shaping the service and those who use it. A focus on service production would make it relevant to ask what impact the use of resources within the area of the activity has on female and male users.

- How are resources (money, space, time or other resources) divided between female and male users?
- What qualities and contents do the resources offer in relation to female and male users?
- How do women and men gain access to the resources (service, assistance/help, thresholds)?

If women and men obtain precisely equal shares of the resources, a survey of *representation and resources* will give the same information on the distribution of resources.

## **R3 Reality assessment: What questions do the findings give rise to?**

The last part of the 3R analysis is a discussion and assessment of the state of gender equality within the operation. Consideration is given to the survey of *representation and resources*, seeing which problems emerge and in the event seeking explanations for the overall picture. This is done against a background of a fuller understanding of women's and men's different conditions, needs and interests. This part of the analysis gives one an opportunity to think through one's own workaday practice, by focusing on the relation between the activity's paramount objectives and the practice revealed by the survey. A discovery through the survey of whether women and men receive *equal or unequal offers* can be discussed from the point of view of whether these can be seen as **equivalent offers**.

The reality assessment discussion is often a longer process which is set in motion by the survey, and which may as the case may be lead to concrete measures and changes within the activity. It is a process which involves all decision-makers and service providers within the activity. **The most important concern for those actually carrying out the 3R project will be to raise good and relevant issues for discussion in the light of the survey results.**

- Why do representation and the division of resources between women and men look the way they do? Are there objective and reasonable grounds for any differences? Or has the survey uncovered unreasonable and inequitable conditions?
- Are women's and men's conditions, wishes and needs met on equal terms?
- Are there norms and values in the organizational culture, or in the ways in which things are organized, which help to maintain the differences between women and men?
- Are there any activities or decisions which unintentionally contribute to maintaining differences between women and men?

In order to determine whether a service is equitable, knowledge is needed concerning gender, i.e. knowledge of women's and men's different conditions, wishes and needs in relation to the service. Such knowledge can be obtained from previous research or through one's own investigations. For instance:

- How many women and how many men live in the neighbourhood of a facility?
- How many women and men satisfy the criteria, if any, for being offered a service?
- How many women and how many men need or would like the service?
- Which aspects of the service are important to women and to men?

The most important features of a 3R analysis are that it can provide **gender-relevant knowledge** about the activity, develop **greater awareness** of the importance of thinking in terms of gender, and thus create **a basis for discussion of how to improve the quality of the service**. This comes about when attention is drawn to relevant questions and challenges and when, as the case may be, further measures are proposed.

## **6.2 Gender equality, survey, analysis, conclusion. Gender equality assessment according to JämKAS**

What follows is a description of the successive steps in a gender equality assessment. The method was developed in the Swedish Ministry of Industry, Employment and Communication<sup>4</sup>, by means of practical trials and cooperation within Sweden's central government administration.

JämKAS (equality, survey, analysis, conclusion) is a method of carrying out a systematic gender equality assessment of an area.

1. An analysis of an area based on gender equality thinking.
2. A basis for choosing the most relevant area in which to continue the work.
3. Help with reformulating objectives and choosing indicators for promoting gender equality.
4. Measures for promoting gender equality.

### **Step 1: SURVEY**

#### **1. Which target groups are affected by the activity?**

To find the activity's target group, take the objectives as a point of departure. Which people participate in the activity as citizens and users, directly in the capacity of road-users, tradespeople and clients, and in some cases indirectly as relatives?

#### **2. What conditions apply to women and men?**

Survey women's and men's representation in the target groups. How many women and how many men participate in the activity? Go on from there and survey the distribution of or access to resources for women and men in the target groups. If there is a gender pattern, it will appear. Use diagrams to illustrate the numbers: it makes it easier to see such patterns.

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<sup>4</sup> By Helén Lundkvist and Anna-Marie Sandquist of the Division for Gender Equality.

### **3. Make a list of conceivable causal connections**

Any gender patterns that emerged during part 2 can be formulated as postulates. For instance: more disabled men than women receive financial assistance towards a car adapted for use by a disabled driver. Write down any conceivable causal connections for the claim – both what the reasons may be and what consequences they have.

Note that the causal connections in this part of the survey are hypothetical; one can therefore be inventive when identifying causes.

Bear in mind that the problem you are concerned with is the *relation* between women and men. Try, therefore, to enter the terms ‘women and men’ both in the problem and in the causes. Otherwise you risk focussing for instance on the group women as a problem in isolation from the group men. This means missing out where women as a group stand in relation to men as a group and forgetting that when all is said and done the problems you are raising concern power and norms.

### **4. Reject or confirm the causal connections**

The causal connections listed in part 3 must be tested. Find statistics or other information (perhaps references to research or qualitative studies) that shed light on the hypothetical connections. It may transpire that the hypotheses are false and have to be rejected. Try to be as clear as possible when presenting arguments for the causal connections which can be confirmed.

If there is no information, it is important to point this out. There may for instance be no statistics available in the area, or such statistics as are available may not be gender-responsive. Improving information can be worth proposing as a way of obtaining a fuller picture of the gender equality situation in the area.

## **Step 2: ANALYSIS**

### **1. Identify the problem**

At this stage of the analysis, a picture has emerged of the factors underlying and the consequences of the gender pattern which the survey revealed. The next step is to analyse the postulates formulated in part 3 above. Rephrase the postulates so as to formulate a gender equality problem.

A need to reformulate the problem may appear during the survey work. It may become necessary to take account of a new aspect which proves to have a greater impact on the gender equality issue in the area than the problem with which one started.

### **2. Describe the problem**

Consider the problem in relation both to general objectives, to the gender equality objectives for the activity, and to the over-riding objectives for gender equality in society. In what way does the problem relate to the target that women and men should have the same rights, duties and opportunities in all areas of life? What bearing does it have on:

- Equal distribution of power and influence?
- The same opportunities for financial independence?
- The same opportunities and premises with regard to employment, engagement in business, working conditions, and scope for development in working life?
- Equal access to education and opportunities to develop own personal ambitions, interests, and talent?
- Shared responsibility for home and children?
- Freedom from sexually-related violence and sexual harassment?

The analysis must include accounts of where, in the event, knowledge is lacking in the field, a description of the results achieved in relation to the objectives in question, and a description of what an activity would be like where equality was the rule.

### **3. Identify the players and interested parties**

When the problem has been described and the underlying factors identified, those players must be identified who have an opportunity to influence and who are influenced by the consequences of the gender equality problem.

Take the survey of the problem as a point of departure.

### **Step 3: MEASURES**

#### **1. Propose measures**

Formulate proposals for measures that can contribute to a more gender equal operation. If one does not have access to or the possibility of influencing all the players identified under point 3, the problem should be passed on to those responsible for it. Show how the work is followed up from there on.

### **6.3 Diane Elson – Evaluation of resource distribution within a delimited budget sector**

This method is suitable for evaluation of how resources have been distributed between women and men within a delimited budget sector, for example a grant scheme. The model was developed by the British professor Diane Elson, an economist and expert on gender equality from the University of Essex.

The model defines four levels: input, activity, output and effects.

#### **Model for the analysis**

A review of the scheme and the distribution of financial resources is carried out with the help of the following questions:

##### *Input*

- How much money was distributed?
- How many people make up the scheme's target group?
- Who belongs to the target group for the scheme?
- How many have participated in the scheme?

- How are the participants distributed by gender? Does this accord with the objectives for the target group?

#### *Activities*

- How many projects have received grants from the scheme?
- What types of project are they?
- How were the projects designed and described?
- What are the criteria for being granted funds from the scheme?

#### *Output*

What actual results/consequences have the projects had?

- Were the results as expected?
- How was the money divided between women and men?
- Are there differences between women and men?
- What is the significance of this distribution of resources in a gender equality perspective?

#### *Effects*

Has the distribution of funds in the program had the desired effect

- In relation to the objectives of each project?
- In relation to the objectives for the area of activity?
- In relation to paramount political objectives?
- In relation to the targets for the integration of the gender equality perspective?
- In relation to the adopted gender equality objectives?

## 7 – EXAMPLES

### 7.1 Measures for adolescents in larger urban communities<sup>5</sup>

The grant scheme “Measures for adolescents in larger urban communities” (Ministry of Children and Family Affairs, Ch. 857 Measures for children and adolescents, item 73- measures for children and adolescents in larger urban communities) is an instrument the purpose of which is to improve the conditions under which young people live and grow up in larger urban municipalities. An important target for the funds is “equal worth and equal opportunities for girls and boys”.

The Ministry of Children and Family Affairs wanted to study whether the same priorities are applied to girls and boys when applications are considered and prioritized in the selected municipalities.

1. **Representation (1R)** of girls and boys in the population, and among the administrators, applicants and users.

- In most of the selected areas, there is a slight majority of boys over girls in the 10 to 24 age group.
- The case-handlers in all four areas studied were men. In so far as women were involved in the procedure, this was as advisors, in discussions, or as representatives in a working party that was working on similar matters.
- Of the 22 projects which received funds, 12 involved both boys and girls. Of the remainder, 7 projects were aimed at boys and 3 projects were aimed at girls.

2. **Resource distribution (2R) between girls and boys.**

- NOK 2 937 000 was granted to projects for both boys and girls.
- NOK 905 000 was granted to projects involving boys only.
- NOK 435 036 was granted to projects aimed at girls.
- Grants to boys’ projects averaged NOK 900 per head.
- Grants to girls’ projects averaged NOK 700 per head.

A larger number of projects aimed at boys than projects aimed at girls applied for large urban community funds for 2003. Of the funds granted, the boys received on average more than the girls per person. As a whole the project forms show that most of the funds for 2003 were granted to projects aimed at both boys and girls.

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<sup>5</sup> The example is based on the report “Likeverd og like muligheter for jenter og gutter? – Likestillingstest av tilskuddsordningen ”Ungdomstiltak i større bysamfunn” (equal worth and equal opportunities for girls and boys? – Gender equality test of the grant scheme ”Measures for adolescents in larger urban communities”. Fredrikkes Hage 2003. [www.fredrikkehage.com](http://www.fredrikkehage.com) .

### **3. Reality (3R): why the distribution is as it is.**

- In general, more boys than girls are placed in the “vulnerable adolescent” category. One consequence of this is that schemes are set up aimed especially at boys.
- Boys are “seen and heard best”. Girls are not so conspicuous or easy to catch sight of.
- Case-handlers say they find it more straightforward to set up facilities for boys than for girls.
- Although schemes are set up which are intended for use by both sexes, boys often predominate and make most use of the schemes. The reason for this may be that the activities are adapted for boys.

### **7.2 The value-creation program for food production<sup>6</sup>**

The grant scheme “Verdiskapingsprogrammet for matproduksjon” (the value-creation program for food production) (the Ministry of Agriculture and Food, Ch. 1149 value-creation and development measures in agriculture, Item 50 Grants to the agricultural development fund) the aim of which is to enable primary producers to increase their incomes by means of innovative initiatives in the food industry or cooperation with existing enterprises.

The gender equality objective is for the proportion of applicants to reflect women’s activity and ownership in the field of agriculture.

**R 1 Representation** of women and men among those who initiate, facilitate, manage and use the Value-creation Program for Food Production.

- The representation of women in the steering group and the reference group is a little under 50%.
- The program secretariat comprises two men and one woman; the chairman is a man.
- Of the contacts for the program from the County Governor’s Agriculture Department, about 50% are women. The corresponding figure for the Industrial and Regional Development Fund is 31%
- Nearly 30% of the project leaders are women.
- 13.6% of the steering groups have at least 40% representation of both sexes.
- On average, women apply for slightly smaller amounts than men. On the other hand, larger amounts are granted to women.
- Women are responsible applicants for major projects, and female project leaders are on average responsible for larger grants than men.

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<sup>6</sup> The example is based on the report “Likestillingstest av Verdiskapingsprogrammet for Mat” (gender equality test of the value-creation program for food), Fredrikkes Hage 2003, [www.fredrikkesbage.com](http://www.fredrikkesbage.com).

**R 2 Resources:** how are the grants divided between women and men?

- Projects with men as the responsible applicants have received over 25.5 million NOK.
- Female applicants have received NOK 4.5 million.

**R 3 Reality:** what are the reasons for the differences between women and men?

- The Industrial and Regional Development Fund's customer group:

The customer structure resembles the structures found elsewhere in business and industry.

- Structures in the industry

Men predominate in the agriculture industry.

- Demands projects must meet

The Value-creation in Food Production program finances high-risk projects. In the district offices of the Industrial and Regional Development Fund it is said to be an acknowledged fact that many women are reluctant to take on high risk, especially when running small-scale enterprises.

- Formal networks

The value-creation program is designed to “support existing and newly-established associations of primary producers and food enterprises engaged in economic or organizational cooperation with primary producers which need venture capital.” Research shows that women are not to the same extent as men involved in the locality's most important networks.

- Perceptions

Case-handlers in the Industrial and Regional Development Fund suggest that women are too traditional and that many of their proposed projects are not innovative enough to satisfy the program's criteria. In some cases, a good deal of clarification and dialogue is needed to arrive at the idea's unique features.

### **7.3 The value-creation program for reindeer husbandry<sup>7</sup>**

The grant scheme “The value-creation program for reindeer husbandry” (Ministry of Agriculture and Food, Ch. 1151 In fulfilment of the reindeer agreement, Item 51 Grants to the Development and Investment Fund) is an instrument intended to increase value-creation in the reindeer industry in such a way as to benefit the reindeer owners.

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<sup>7</sup> Based on the report “Gender equality test of the Value-creation Program for Reindeer”, Fredrikkes Hage 2003, [www.fredrikkehage.com](http://www.fredrikkehage.com).



The gender equality objective is for the proportion of applicants to reflect women's activity and ownership in reindeer husbandry.

**R 1 Representation** of women and men among those who initiate, facilitate, manage and use the value-creation program for reindeer husbandry.

- Of responsible applicants, 24% are women and 61% men. The proportion of female applicants to the program is very close to the proportion of women who head husbandry units.

- 14.3% of the steering groups have at least 40% representation of both sexes.

- Of project leaders, 15% are women and 55% men.

**R 2 Resources:** How are the grants divided between women and men?

- 10% of the projects are aimed at women and 41% at men.

- Altogether, men have received a good deal more funds than women. Men's projects are also somewhat larger than women's and need on average NOK 50,000 more in venture capital. Women nevertheless receive on the average a little more than men – the difference amounts to roughly NOK 5,000.

**R 3 Reality:** what are the reasons for the differences between women and men?

- The Industrial and Regional Development Fund's customer group

The customer structure resembles the structures found elsewhere in business and industry.

- Woman-friendly objectives and design

The main target group of the value-creation program is reindeer owners. There are many female reindeer-owners, but few own husbandry units. The aims of the program should accordingly be well suited to women who wish to set up an enterprise in reindeer husbandry.

- Organization of the work

With no mobilisation incorporated in the program, applications will probably mirror established structures and formal hierarchies in the industry. This will have a special impact on woman applicants, who are often not as close to the husbandry operation as men.

- The importance of closeness to practical reindeer husbandry

The more formal ownership women have, and the more active they are, the greater will be their chances of hearing about the projects, seeing opportunities in reindeer husbandry, and obtaining access to sufficient numbers of reindeer.

- Time

Many women are in paid employment in addition to participating in husbandry, and it takes time to take part in local development projects and planning.

- The importance of access to networks

Many of the projects in the value-creation program for reindeer husbandry assume cooperation between husbandry units. These are likely to originate in the cooperation occurring between the men out in the grazing country, at meetings in the reindeer grazing districts, etc. These are networks to which women have little access.

- Attitudes

In the opinion of many female entrepreneurs, attitudes within the administrations that run the grant systems may prevent more women from setting up their own businesses. On the other hand, many in the administration staffs believe that many of the obstacles lie within the women themselves.

#### **7.4 Public transport - Sweden<sup>8</sup>**

Rikstrafiken was made the object of a pilot project in connection with the Swedish government's resolve to integrate gender equality in the fiscal budget. The following are some of the main points in the gender equality assessment of Swedish transport policy.

#### **SURVEY**

##### **What fields of activity and objectives are covered by ministry policies?**

The paramount objective of transport policy is to ensure an economical, efficient and long-term provision of transport for inhabitants and business and industry all over the country.

##### Principal aims for gender equality:

Aim 1: Even distribution of power and influence

Aim 2: The same opportunities for financial independence

Aim 3: Equal conditions and premises relating to business management, employment, working conditions, and development opportunities at work

Aim 4: Equal access to education and opportunities to develop personal ambitions, interests and talents

Aim 5: Shared responsibility for home and children

Aim 6: Freedom from sex-related violence.

##### Gender equality aims for the transport sector:

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<sup>8</sup> Näringsdepartementet, Jämställdhetsenheten, Anna Sandquist, Head of project

- The transport system must be designed to meet the transportation needs of both women and men.
- Women and men must be given the same opportunities to influence the development, structure and management of the transport system
- Equal importance must be attached to the views of women and men.

**Explain the relevance of the gender equality aims to the fields of activity**

- The priorities and structures of the transport system can influence the opportunities of men and women to achieve financial independence, the conditions under which they can run businesses, and their employment and working conditions. They can also affect their development opportunities at work, their access to education, and their opportunities to develop their personal interests and talents. Transport policy has a bearing on these gender equality aims in as much as it is a matter of designing a transport system so as to meet the transportation needs of both women and men. An efficient transport system makes the everyday lives of women and men easier and leads to greater freedom of choice of dwelling place, employment and leisure activities.
- The aim of even distribution of power and influence is also relevant.
- The other aims are more indirectly linked to the organization and management of the transport system.

**Choose the area of activity which figures most prominently or is of the greatest strategic importance from the point of view of gender equality.**

For the aims - *the same opportunities for financial independence, equal conditions and premises relating to business management, employment, working conditions, and development opportunities at work, and equal access to education and opportunities for development*, the point is that the transport system must be designed in such a way that it meets the transportation needs of both men and women.

With regard to the aim of *even distribution of power and influence*, the point is for women and men to be given the same opportunities to affect the development, structure and management of the transport system, and that their respective assessments must be given the same weight.

Where the aim of *shared responsibility for home and children* is concerned, it will be important to determine whether the politically initiated regional expansion will lead to polarisation, with men commuting over longer distances and women left with greater responsibilities for home and family.

With regard to the aim of *freedom from sex-related violence*, the design of the public environment, not least of stations, underpasses, and walkways, is important. The area of activity is moreover the largest in scope, so that it is well within the means of the authorities to make any necessary alterations.

**Choose the area to be analysed**

Public transport is a strategic tool aimed at facilitating access for groups without access to cars. Women have less access to cars and use cars less than men do.

## SURVEY AND ANALYSIS

### Target groups for public transport

For this analysis, four target groups are chosen according to the purpose of the journey:

- commuting to work
- commuting to school
- business journeys
- private journeys

### Indicators

- How do the men and women in the target groups use public transport?
- How satisfied are they with the infrastructure?

### Analysis

Swedish travel surveys show the following breakdown:

	Train		Bus		Boat		Plane	
	M	W	M	W	M	W	M	W
Business and private (%)	23	30	20	33	46	38	49	38
Work and school (%)	21	27	22	26	12	4	13	4
Total (%)	44	56	42	58	58	42	62	38
Budget*	195	248	16	22	132	95	68	42
Total budget*	443		38		227		110	
Number of journeys (000)	13 000		980		1 400		130	
Budget per journey (SEK)	35		39		160		830	

\* in billions SEK

Interview surveys concerning train use show the following distribution by sexes:

	Train	
	M	W
Business journey (%)	14	7
Journey to work (%)	19	13
Journey to school (%)	13	16
Leisure journey (%)	41	51
Other (%)	13	13
Total (%)	100	100

### Consequences

Travel surveys show that Rikstrafik funds benefited men and women to the same extent. Men make more use of planes and boats, while women make use of trains and buses.

Men and women use the infrastructure for different purposes: men for journeys on business and to work, women for study and leisure. Men make more work-related journeys than women, whereas women use trains for private journeys more than men do.

The reasons for these travel patterns are that men have a larger local labour market and that more men than women have work that entails business journeys. This has a bearing

on the premises for achieving such gender equality objectives as shared responsibility for the home and equal opportunities for employment.

### **Proposed measures for increasing gender equality in the public transport sector and the transport sector in general**

- Strategies for equal gender representation in internal and external decision-making and cooperating groups
- Greater knowledge of women's and men's views on transport questions, including research and customer surveys
- Greater knowledge of women's and men's local labour market regions
- Investment in public transport, for instance in well-developed local networks with greater frequencies
- Measures to improve women's and men's actual and perceived safety in the transport system and in public areas
- Systematic reviews of rules and routines aimed at ensuring that the gender equality aspect is always taken into account in the planning, decision-making and management of the transport system
- Consequence analyses aimed at incorporating women's and men's needs and views when planning new infrastructure.

## **7.5 Resource distribution in the health services - Sweden**

This example shows aspects relating to both method and content, and sums up experience gained in a gender budgeting project carried out in the Stockholm region health services in 2004<sup>9</sup>. The analysis was carried out with support from the Ministry of Children and Family Affairs as a contribution to the cooperative Nordic project on the integration of the gender and equality perspective in the work on the fiscal budgets in the Nordic countries. A corresponding but less extensive projects carried out at Rikshospitalet in Oslo showed similar results.<sup>10</sup>

The example is presented in three sections

- an organizational theory section (A)
- an inter-sector section (B)
- a survey section (C).

The presentation opens with a brief summary of the project from a methodological point of view. The project is an example of gender and equality assessment at the micro level. The study investigates an activity in a concrete and delimited area, the dermatology department of a hospital near Stockholm. One can not automatically conclude from the results that the disparities revealed in the treatment of male and female patients can be found in this entire sector of the health services. There is on the other hand no reason to assume that the hospital departments studied are not representative.

An important condition for the success of the work was that the top management of the organization, the Stockholm county council (level 1) decided to give priority to gender

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<sup>9</sup> Ingrid Osika, "Tvättsäcks projektet – genusskilnader in på bara skinnet" (the laundry bag project – gender differences down to the bare skin), Linköping University 2005.

<sup>10</sup> Jenny Clarhäll, "Like utslett, men ulik behandling? Behandling av kvinnelige og mannlige psoriasispatienter" (Same rashes but different treatments? The treatment of female and male psoriasis patients), Centre for Gender Equality, 2005.

and equality questions. A person responsible for equality was appointed to a central post in the organization, and a large-scale effort began to boost awareness of gender and equality. This included a travelling exhibition, a home page with information, a course in gender equality for all the organization's heads of department, and a gender equality strategy group.

The increased awareness of the importance of thinking in terms of gender and equality, and the commitment of the chief physician of a dermatology department (level 2), led to a discussion in the workplace. In a cooperation group for the entire staff (level 3), the question was asked of whether there any problems in the department that were relevant to gender and equality. This resulted in a specific question from one of the medical nurses: why were the laundry bags fuller in the men's wing than in the women's wing?

The department head took up the question. It emerged that the laundry bags indicated a wide disparity in the treatment of women and men which no one had noticed before. Treatment at the clinic involved a shower and use of the department's towels. The full laundry bags in the men's wing meant quite simply that men were receiving more treatment.

The department's chief physician (level 2) presented this discovery for discussion in the gender equality strategy group (level 1). As a result, the person responsible for equality drew on extra personnel resources to have the question surveyed. A consultant with expertise both in finances and equality was hired, and the project was placed in the hands of the hospital management. The inter-sector cooperation between the department's chief physician, by profession a dermatologist, and the financial expert, proved to be extremely fruitful.

A phase began which could be called inter-sector snowball-rolling. Inter-sector creativity, competence and intuition were all drawn on in identifying the areas which it might be relevant to analyse. This was a question not only of the dermatology department, but also of other closely-related activities that might shed light on the problem. A broad network of contacts provided access to various types of information. The actual surveying of the areas found interesting was carried out by means of such familiar methods as the 3R method, and Diane Elson's method for evaluating the distribution of resources within a limited area. The purpose of the surveys was to gather statistics and examine the use of resources in the department.

It was a necessary precondition that the databases containing information on patients were structured so that gender could be correlated with other variables. The chief physician made a member of the dermatology department staff available to work on obtaining such information. It appeared that the differences between the sexes were on a much larger scale than had first been imagined, and comprised more than just differences in treatment. The total differences in costs also proved to be considerable.

When the result was published, the chief physician was criticised by colleagues. The criticism was met by the regional head and by the person responsible for equality (level 1), who spoke out clearly in support of the project. In the longer term, the chief physician's commitment has opened up a new area for research and had a beneficial effect on her professional career.

The higher level of awareness of differences between the sexes led to further questions. Where should one place the norm for treatment, among women or among men? Should training facilities be made available at which men (and women) learn to cope with their own illness? Such facilities already exist for children.

Awareness of the lop-sidedness in the treatment of women and men prompted the physicians in the department to alter their requisitioning and to begin to give the same treatment to both sexes. Women nevertheless break off their treatment at the clinic to a greater extent than men. The problem is still being studied, but now with more qualitative methods. To survey the experiences and needs of women and men with regard to illness and treatment, interviews in depth are now among the methods being used. Another result of the project was that all dermatology departments in Swedish hospitals are now going to study their treatment statistics in a gender perspective.

### **A. Organizational theory**

Success with gender equality assessments at the micro level depends on prioritization of gender and equality questions at the organization's very highest level (1). This means setting resources aside for the work, and spreading knowledge and awareness of the issues strategically throughout the organization. A good strategy is to ensure that people with gender equality competence are available at the operation's management level (level 2). They bring the questions to the attention of the staff (level 3) as well as perceiving problems as and when they arise. It is the staff (level 3) who have the experience of the operation, which is why it is important to find channels through which such experience can be brought to the surface. By maintaining contacts with the senior gender and equality structure (level 1), heads of departments can obtain support and resources with which to analyse current issues. Support from the senior person responsible for equality can subsequently provide a platform and assistance for a project throughout its entire duration. Another precondition for a successful result is that gender-responsive statistics exist for the work of the entire organization.

### **Premises and working methods**

1. Commitment to equality in the organization's top management (level 1).
2. Clear structuring of gender equality work at the heart of the organization (level 1).
3. Strategic distribution of gender and equality expertise in the whole organization. Training of heads of operations, e.g. chief physicians of departments (level 2), who are made responsible for putting questions to the whole staff (level 3).
4. Channels and fora where heads of departments can take up problems as they arise.
5. The top equality and management structure (level 1) must provide contacts, establish platforms for projects, support projects, and make sufficient resources available for promising projects.

### **B. Interdisciplinary snowball-rolling**

Linking up with external competence and "new eyes" from the outside is fruitful. Cooperation with various kinds of knowledge and competence increases creativity in the

work of identifying which areas to survey. Of course the core activity must be surveyed, but adjacent areas and activities may also be relevant. This inter-disciplinary dialogue continues throughout the whole project process, when new ideas about inter-connections and perspectives are discussed and evaluated. When the survey has been completed, inter-disciplinary analysis and theoretical discussion continues.

### **Premises and working methods**

1. Call in expertise from outside, where appropriate with an inter-disciplinary profile, and combining gender and financial competence.
2. In the inter-disciplinary cooperation, and with support from the person responsible for equality (level 1), identify the areas to be surveyed (in part C) inside and outside the organization.
3. Keep up this process of creative inter-disciplinary cooperation throughout the entire project, generating new perspectives and approaches that can be surveyed.
4. When the survey (part C) has been completed, the material must be analysed and the theoretical consequences of the findings must be discussed. Finally, changes are proposed.

### **C. Surveying**

The actual surveying of the areas found important in part B is done in the usual way, for instance using the 3R method. This part is mainly concerned with in-depth investigations aimed at gathering gender-responsive statistics and revealing the activity's use of resources.

### **Premises and working methods**

1. Gender-responsive statistics for the areas to be surveyed are collected. A precondition for this is that the top management (level 1) has decided to keep gender-responsive statistics for the whole organization's operations.
2. Apply a cost perspective to the areas examined.
3. For more detailed guidance on this work, see the descriptions of 3R and Diane Elson in the methodological section.

## **7.6 Gender equality assessments of income, employment and time use**

In 2005, an analysis at the macro level of the distribution of resources between women and men was carried out for the first time. The measure was implemented in accordance with the principles laid down in this guide:

- a political and institutional base at the highest level
- allocation of resources for the implementation
- inter-disciplinary cooperation
- presentation in the annex to the Fiscal Budget (Proposition no. 1 to the Storting for the Ministry of Children and Family Affairs)
- formulation of aims and indicators
- survey and analysis of gender-responsive data.

On the initiative of the Ministry of Children and Family Affairs, the Committee of State Secretaries for Equality decided in January 2005 that the Government should include a proposal for redirection of the work of integrating a gender and equality



perspective in its budgeting procedure. In May, the Bondevik II Government resolved that in future the gender equality annex to the budget should be drawn up around a unifying theme at the macro level. For the gender equality annex to the budget proposition for 2005-2006, the theme chosen was: the distribution of financial resources between women and men. Income, employment and time use. It was furthermore resolved that the themes of low income and immigrant backgrounds should be dealt with separately. The aim is for the annex to contribute to a more over-arching approach to integrating gender and equality assessment in the budgeting work. A further aim is for the gender equality annex to be of greater direct use to the ministries, as reference data for and as a background to their gender equality assessment efforts in their own sector budget areas.

Statistics Norway, where the Ministry of Children and Family Affairs has in recent years funded a part-time post as gender equality coordinator, was asked to carry out a survey and analysis. The Ministry placed project funds (NOK 250 000) at the disposal of Statistics Norway, which carried out the survey and analysis. A working group was set up which reported to the Committee of State Secretaries for Equality. The working group was headed by the Ministry of Children and Family Affairs and included the ministries most closely concerned: the Ministry of Finance, the Ministry of Government Administration and Reform, the Ministry of Labour and Social Inclusion, and the Ministry of Local Government and Regional Development. The working group defined its assignment in concrete terms in cooperation with Statistics Norway and commented on draft reports as they came out. All the divisions affected in Statistics Norway contributed in their respective areas. The equality coordinator coordinated the contribution and contacts with the principal. One external researcher, Hilde Bojer of the University of Oslo's Economics Department, who has been working recently on income development over the past 30 years in a gender perspective, was also consulted and made helpful suggestions.

The first decisions to be made concerned indicators and sources of data. To ensure comparability, data were obtained from Statistics Norway's labour market statistics, income and wages statistics, and time use surveys. The following indicators were chosen and provided with tables, figures and texts, all divided and commented on for women and men:

## **1 Employment and time use**

### **\* Employment**

- Percentage in employment
- Links to the labour market/Part-time frequency
- Sector
- Proportion in senior posts
- Gender-conditioned choice of occupation
- Unemployment
- Employment among immigrants
  - Employment by period of residence
  - Unemployment among first-generation immigrants

### **\* Time use**

- Time use in paid employment
- Time use in unpaid domestic work

- Time use among parents of small children
- Leisure time

## **2 Pay**

- Monthly salary in the public and private sector
- Wage differentials by industry
- Wage differentials by occupation and degree of seniority in the private sector
- Wage differentials by level of education
- Wage differentials by age
- Wage dispersion
- Fringe benefits

## **3 Income**

- Total income/income gap
- Income from employment
- Capital income
- Transfers liable to tax
- Tax-free transfers
- Assessed taxes and negative transfers
- Income after tax
- Income by type of household
  - Income from employment
  - Capital income
  - Sickness benefit
  - Daily unemployment benefit
  - Tax-free transfers
  - Assessed taxes
  - Transfers liable to tax
    - Old age pension
    - Disability pension
    - Occupational pension

## **4 Low income**

- Low income development 1986-2003 according to the OECD scale (under 50 per cent of the median income)
- Low income development 1986-2003 according to the EU scale (under 50 per cent of the median income, adjusted for size of household)
- Continual low income
- Characteristics of women and men with continual low incomes

## **5 Income among women and men with immigrant backgrounds**

- Composition of income and total income, first-generation immigrant women, by country of origin
- First-generation immigrant women's income from employment as a proportion of other resident women's income from employment, by age and country of background
- First-generation immigrant women's income from employment as a proportion of men's income from employment, by age and country of background

- All resident women's income from employment, by age, as a proportion of men's income from employment

## **6 Main features of income development 1982-2003**

- a. Development in total incomes for women and men (ten-year birth cohorts) born 1961-66/70, b. 1951-60, b. 1941-50, b. 1931-40, b. 1921-30, and b. 1911-20, measured in 1982, 1986, 1990, 1994, 1998, 2002, 2003.
- b. Relative income differentials between women and men for the same birth cohorts and the same years.
  - i. total gross income
  - ii income after tax
  - iii income from employment

### **Presentation as an annex to the Fiscal Budget (2005-2006)**

The report was presented and discussed in the Bondevik II Government's Committee of State Secretaries for Equality. The Committee approved the report for presentation in an annex to the Fiscal Budget for 2006.

### **Follow-up**

The report identifies and considers the problems raised by the major differences in income, employment and time use between women and men. The Stoltenberg II Government will incorporate the findings in a broadly-based approach to gender equality in the labour market and in the family.

## **8 – OBTAINING DATA AND DRAWING ON COMPETENCE**

Gender-responsive statistics and guidance and information on gender equality assessment in budgeting work, and more generally in policy sectors, can be found at both national and Nordic Internet addresses. In the list below we also give the names and addresses of resource persons and centres of competence in this area

### **8.1 The Internet**

The Centre for Gender Equality

<http://www.likestilling.no>

Statistics Norway, gender equality web site

<http://www.ssb.no/emner/00/02/10/>

<http://www.ssb.no/emner/00/02/10/likestilling/>

The Norwegian Association of Local and Regional Authorities. Project: Gender equality in municipal planning

[http://www.ks.no/templates/KS/KS\\_Page.aspx?id=28906](http://www.ks.no/templates/KS/KS_Page.aspx?id=28906)

Municipality of Bergen, mainstreaming project

[http://www.bergen.kommune.no/likestilling/gender\\_mainstreaming.html/](http://www.bergen.kommune.no/likestilling/gender_mainstreaming.html/)

Hordaland county municipality, mainstreaming project

<http://www.hordaland-f.kommune.no/planogmiljo/likestilling/mainstream/>

The Northern Feminist University guide to the integration of gender equality in municipal planning

<http://www.veileder.org/>

The Nordic Council of Ministers' gender equality page. See under GRB (Gender Responsive Budgeting)

<http://www.norden.org/gender/sk/index.asp?lang=1#>

The Minister for Gender Equality, Denmark. Here one can among other things find a useful guide to the integration of the gender perspective in legislation, campaigns, budgeting, etc.

<http://www.lige.dik/?id=376>

The Swedish Ministry of Industry, Employment and Communication, Division for Gender Equality

<http://www.regeringen.se/sb/d/2593;jsessionid=a8Cj4iDnVZo4>

### **8.2 Competence environments and experts**

The Ministry of Children and Equality

<http://www.regjeringen.no/nb/dep/bld/tema/Likestillingsomradet.html?id=1246>

[http://www.regjeringen.no/nb/dep/bld/tema/andre/Integrering\\_av\\_kjonnsperspektivet.html?id=1253](http://www.regjeringen.no/nb/dep/bld/tema/andre/Integrering_av_kjonnsperspektivet.html?id=1253)

Contacts:

- Anne Galand, Department of Family and Gender Equality  
E-mail [ang@bfd.dep.no](mailto:ang@bfd.dep.no)
- Ylva Lohne, Department of Family and Gender Equality  
Tel. 22242544, e-mail [ylo@bfd.dep.no](mailto:ylo@bfd.dep.no)

### **The Equality and Anti-discrimination Ombud**

8049 Dep  
0031 Grensen 5-7  
P.O. Box Oslo  
[www.ldo.no](http://www.ldo.no)

### **Fredrikkes Hage**

Fredrikkes Hage offers advice and guidance, process management, gender and equality assessment, evaluations, lectures on methods, and training. Its main fields are public planning, integration of gender and equality, agriculture, and gender equality in business and industry. Fredrikkes Hage has contributed to the specialist contents of the present guide.

Fredrikkes Hage  
Jakob Weidemansgt. 9  
7714 Steinkjer  
[fredrikkes.hage@fredrikkeshage.com](mailto:fredrikkes.hage@fredrikkeshage.com)  
[www.fredrikkeshage.com](http://www.fredrikkeshage.com)

Contacts:  
Karin Hovde, tel. 91 19 30 41

### **The Northern Feminist University**

The Northern Feminist University offers expertise in gender and equality questions relating to the following areas: working life, local and regional development and planning, resource management and resource-based industries, health, violence, trafficking and prostitution, democracy, and cooperation in the Barents region. The University has among other things prepared an Internet-based guide to the integration of the equality perspective in municipal planning.

The Northern Feminist University  
8286 Nordfold  
Tel. 75 77 90 70  
[post@kun.nl.no](mailto:post@kun.nl.no)  
[www.kun.nl.no](http://www.kun.nl.no)

### **The Women's University**

The Women's University offers tailor-made courses and seminars in the fields of management, motivation, multiplicity, networks, self-development, board work, and economics. The Women's University carries out gender equality tests, runs gender equality and multiplicity information and motivation campaigns, and carries out other studies and analyses in the area.

The Women's University  
Rosenlund  
2340 Løten  
[www.kvinneuniversitetet.no](http://www.kvinneuniversitetet.no)

Contacts:  
Kjersti Hoff, tel. 62 54 74 67/97 12 09 60  
Nina Johannesen, tel. 62 54 74 65/93 46 84 51

**Research environments**

The Stein Rokkan Centre for Social Studies

Research into the consequences of the mainstreaming projects in Bergen and Hordaland

<http://www.rokkansenteret.uib.no/projects/?/?present&id=24>

## 9 – CHECK-LIST<sup>11</sup>

- All individual-based statistics in tables, diagrams and texts should be presented and analysed divided according to gender
- Examine the distribution of women and men in the target group. When the target group consists of immigrants, recipients of social welfare benefits, clients, employees, vulnerable children etc., it should be made clear that one is dealing with women and men, boys and girls, for instance vulnerable boys and girls, female and male employees. The design of the measure and the planned use of resources must be adapted accordingly.
- If one has no gender-responsive statistics or knowledge about gender in the area, measures should be proposed for obtaining such documentation.
- It should be made clear that measures comprise both women and men, boys and girls, or alternatively, women or men, boys or girls.
- When the costs of a measure are known, distribution by gender should if possible be shown.
- The analysis should take as its point of departure men's conditions in relation to women's, or boys' in relation to girls', and should lead up to measures which cater for the gender equality perspective
- The analysis should contain an assessment relating to the objectives of gender equality policy, in which some of the objectives may be of special interest.

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<sup>11</sup> Inspired by a guide to the integration of the gender equality perspective in budget texts prepared by the Swedish Ministry of Industry, Employment and Communication.

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