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Empowerment of Women**

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United Nations Evidence and Data for Gender Equality (EDGE) Midterm Review Technical
Meeting

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Report of the Meeting ¹

Prepared by
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I. INTRODUCTION

Background and objective of the meeting

1. The Evidence and Data for Gender Equality (EDGE) Midterm Review Technical Meeting took place in Kitakyushu-city, Japan, 3-5 December 2014. The meeting was organized by the United Nations Statistics Division (UNSD) in collaboration with UN Women.
2. The EDGE project seeks to accelerate existing efforts to develop internationally comparable gender indicators on health, education, employment, entrepreneurship and asset ownership. This project is a three-year initiative building on the work of the Inter-agency and Expert Group on Gender Statistics (IAEG-GS), jointly managed by UNSD and UN Women and implemented in collaboration with the African Development Bank (AfDB), the Asian Development Bank (ADB), the Food and Agriculture Organization (FAO), the Organization for Economic Co-operation and Development (OECD), and the World Bank.
3. The meeting was attended by representatives of the national statistics offices of China, Fiji, Georgia, Ghana, Japan, Republic of Korea, Maldives, Mexico, Mongolia, Philippines, South Africa, Swaziland, Uganda, and the United States; as well as representatives of ADB, the International Labour Organization (ILO), the Kitakyushu Forum on Asian Women (KFAW), the United States Agency for International Development (USAID), the United Nations Statistical Institute for Asia and the Pacific (UN/SIAP), UNSD, UN Women, and the World Bank. (See Annex I for the list of participants).
4. The key objectives of the three-day meeting were to: (a) promote the integration of a gender perspective into national statistical systems with the aim of improving the availability and quality of gender statistics, including statistics on the “emerging issues” of asset ownership and entrepreneurship; (b) update participants on the progress made by the EDGE initiative to advance methodological development on measuring asset ownership and entrepreneurship from a gender perspective; (c) receive feedback from national statisticians on the feasibility of implementing the recommendation(s) of the EDGE Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective (MEXA) with regards to whom in the household should be interviewed about the ownership, control and valuation of assets at the individual level; (d) receive feedback from national statisticians and partner agencies on the applicability and feasibility of the methodology proposed under the EDGE project to measure entrepreneurship from a gender perspective; and (e) ensure that country implementation plans are in place for piloting data collection on asset ownership and control under the EDGE initiative during 2015.

Organisation of the meeting

5. The meeting was conducted according to the document “Agenda” (Annex II). The meeting commenced with opening remarks from Ms. Keiko Osaki-Tomita, Chief, Demographic and Social Statistics Branch. Ms. Osaki-Tomita welcomed the participants and thanked them for traveling to Kitakyushu-city to take stock of the progress made by the EDGE initiative to measure asset ownership and entrepreneurship from a gender perspective and introduced the agenda of the meeting. Following Ms. Osaki-Tomita’s remarks, Ms. Mitsuko Horiuchi, president of the KFAW, which served as the local host of the meeting, welcomed the participants to Kitakyushu-city. Mr. Papa Seck, of UN Women, then gave an introductory presentation on the EDGE initiative and the objectives of the meeting. The introductory presentation was followed by three presentations on the Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective (MEXA). First, Mr. Gulab Singh and Ms. Lauren Pandolfelli, both of UNSD, presented an overview of MEXA and the questionnaire used in the experiment. Second, Mr. James Muwonge, of the Uganda Bureau of Statistics (UBoS), and Ms. Heather Moylan, of the World Bank, discussed the lessons learned from implementing the experiment. Third, Mr. Talip Kilic, also of the World Bank, presented key findings from MEXA with regards to whom in the household should be interviewed for collecting data on the ownership, control and valuation of assets at the individual level. The meeting participants then broke into working groups to discuss the implications of the findings and lessons learned from MEXA for piloting data collection in 2015.

6. Day 2 focused on measuring entrepreneurship from a gender perspective. Mr. Singh provided a summary of the key issues discussed at the first EDGE technical meeting convened on entrepreneurship and introduced the draft EDGE methodology on measuring entrepreneurship from a gender perspective, including a proposed operational definition for measurement. Mr. Kieran Walsh, of the ILO, then presented new international standards on statistics of work employment and labour underutilization under the 19th ICLS Resolution and their implications for the measurement of entrepreneurship under the EDGE initiative. Following Mr. Walsh’s presentation, Ms. Pandolfelli presented a conceptual framework and key indicators for measuring entrepreneurship from a gender perspective. This was followed by a presentation by Mr. Singh on data collection strategies, including household surveys, enterprise surveys and business registers. Next, Ms. Pandolfelli presented a detailed review of the entrepreneurship module in the MEXA questionnaire, including a mapping of specific questions to the conceptual framework and indicators proposed in the EDGE methodology. Finally, the meeting participants broke into working groups to discuss the feasibility of the proposed EDGE methodology on measuring entrepreneurship from a gender perspective.

7. Day 3 focused discussions on implementation plans for pilot data collection in 2015. Mr. Kaushal Joshi, of the ADB, as well as the representatives of each pilot country, presented a

timeline of activities for the EDGE pilots and discussed additional assistance needed from the EDGE project.

8. The meeting concluded with a summary of next steps for EDGE to pursue.

II. SUMMARY OF PRESENTATIONS AND DISCUSSIONS²

Session 1. Welcome

9. The meeting commenced with opening remarks from Ms. Keiko Osaki-Tomita, Chief, Demographic and Social Statistics Branch. Ms. Osaki-Tomita welcomed the participants and thanked them for traveling to Kitakyushu-city to take stock of the progress made by the EDGE initiative to measure asset ownership and entrepreneurship from a gender perspective and introduced the agenda of the meeting, which was then adopted by the meeting participants. Following Ms. Osaki-Tomita's remarks, Ms. Mitsuko Horiuchi, president of the KFAW, welcomed the participants to Kitakyushu-city.

Session 2. Overview of EDGE Project

10. The presentation, made by Mr. Seck of UN Women, introduced the EDGE project and discussed the objectives of the meeting. A three-year initiative building on the work of the Inter-agency and Expert Group on Gender Statistics (IAEG-GS), EDGE seeks to accelerate existing efforts to generate internationally comparable gender indicators on health, education, employment, entrepreneurship and asset ownership. Following the recommendations of the UN Statistical Commission, the IAEG-GS identified a minimum set of gender indicators intended as a common basic set across countries and regions, for the national production and international compilation of gender statistics. The indicators were classified into Tier 1, Tier 2, and Tier 3 indicators.³ Specific objectives of the EDGE project include (a) compiling at the international level selected Tier 1 gender indicators and (b) undertaking methodological work on Tier 3 gender indicators, specifically to develop methodological guidelines on measuring asset ownership and entrepreneurship from a gender perspective. Currently, 35 quantitative and nine qualitative Tier 1 indicators are available online at <http://unstats.un.org/unsd/gender/data.html>, and draft methodological guidelines on measuring asset ownership and entrepreneurship have been developed. These guidelines will be piloted in 2015 in 9 countries: Fiji, Ghana, Georgia, Maldives, Mexico, Mongolia, Philippines, Swaziland, and South Africa. A 10th country, Uganda, piloted data collection in 2014 in the Methodological Survey Experiment on Measuring Asset

² All of the presentations are available on the UNDS website at http://unstats.un.org/unsd/gender/EDGE/Events/2014/Japan/list_of_docs.html

³ Tier-I indicators are conceptually clear, have agreed international definitions and are regularly produced by countries. Tier-II indicators are conceptually clear with agreed international definitions but are not yet regularly produced by countries. Tier 3 indicators lack international definitions and are not regularly produced by countries.

Ownership from a Gender Perspective. Following the pilots, the draft guidelines will be revised and presented to the UN Statistical Commission in 2016.

11. The EDGE Midterm Review Technical Meeting had four main objectives: first, to update participants on activities undertaken by the EDGE initiative since its inception; second, to present the findings of the Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective and receive feedback from national statisticians and partner agencies on the feasibility of the recommended interview setting; third, to present and receive feedback on the proposed EDGE methodology on measuring entrepreneurship from a gender perspective; and fourth, to discuss country preparation for piloting EDGE data collection in 2015.

Session 3. MEXA Overview and Questionnaire Construction

12. The first half of the presentation, made by Mr. Singh of UNSD, provided an overview of MEXA, including the impetus for the experiment, the interview settings tested and the sampling design. In 2013, EDGE developed a draft Technical Report on Measuring Individual Level Asset Ownership and Control, the implementation of which was discussed in a technical meeting, held in Bangkok, in July-August of that year. Participants at the meeting, including representatives from national statistical offices, regional commissions and donor agencies, suggested developing clear guidelines on the approach to respondent selection for collecting data from household surveys on the ownership and control of assets at the individual level. In response, the EDGE project and the World Bank Living Standards Measurement Study (LSMS) program formally established a partnership to provide technical and financial support for the design, implementation and analysis of a methodological household survey experiment in Uganda that aims to provide a comparative assessment of different approaches to respondent selection for the measurement of individual level asset ownership and control. Building on the recommendations of the Follow-up Meeting on Measuring Asset Ownership from a Gender Perspective that was held in November 2013 with participation from UNSD, UN-Women, World Bank, USAID, UBoS and Yale University, MEXA tested 5 survey treatments in which different respondents are interviewed in sampled households:

1. Self-identified 'most knowledgeable' household member, interviewed alone, asked about assets owned, exclusively or jointly, by any household member (standard practice),
2. Randomly selected member of principal couple - interviewed alone, asked about assets owned, exclusively or jointly, by any household member,
3. Principal couple - interviewed together, asked about assets owned, exclusively or jointly, by any household member,
4. Adult (18+) household members - interviewed alone and simultaneously, asked about assets owned, exclusively or jointly, by any household member, and
- 5.

6. Adult (18+) household members - interviewed alone and simultaneously, asked about assets owned, exclusively or jointly, by individual respondent.

13. The experiment attempted to cover 140 enumeration areas (EAs) (with 84/56 urban/rural split) across Uganda, selected with probability proportional to size (number of households). The actual EA coverage was 137. In each completed EA, following a full household listing, 20 households were selected using systematic sampling with a random start, and 4 households were randomly allocated to each of the 5 treatment arms, translating into an initial allocation of 560 households per treatment arm (before refusals and exclusion of certain households in Arms 2-3 due to the possible absence of a principal couple).

14. In Arms 4-5, the number of respondents was capped at 4 for each household due to logistical considerations. If a household had more than 4 adult members that were eligible for an interview in Arms 4-5, the enumeration teams made sure to target the household head, and the spouse if applicable, with the rest of the respondents selected at random. In total, 2,027 households were interviewed across the 5 treatment arms.

15. The second half of the presentation, made by Ms. Pandolfelli of UNSD, focused on the questionnaire used in MEXA, including a discussion of asset coverage and the operationalization of key concepts. The questionnaire was implemented on Android tablets via Computer Assisted Personal Interviewing (CAPI) software developed by the World Bank and consisted of two parts: a household questionnaire comprising a household roster and a short module on dwelling characteristics and an individual questionnaire comprising modules on the following physical and financial assets: principal dwelling, agricultural land, livestock, agricultural equipment, non-farm business assets and enterprises, other real estate, consumer durables, financial assets and liabilities, and valuables.

16. In the EDGE methodological guidelines, asset ownership is conceptualized as a “bundle of rights,” including the rights to alienate and manage an asset and to use the benefits accruing from its use. Notably, these rights may not all be vested in one individual and ownership rights may be recognized in different ways in different country contexts (e.g. via legal documents or community recognition). In MEXA, four approaches were used to collect information on asset ownership: (1) collecting information on *documented ownership*, by asking respondents whether ownership documents exist for an asset and whose name(s) is listed as an owner on the documents; (2) collecting information on *reported ownership*, by asking respondents to identify who owns an asset, either individually or jointly; (3) collecting information on *economic ownership*, by asking respondents which person(s) would control the proceeds from the sale of the asset; and (4) collecting information about *rights to an asset* by asking respondents who has the right to sell/bequeath/use as collateral/rent out/make improvements to an asset.

17. In addition, MEXA collected information on modes of acquiring assets, the valuation of assets and whether respondents “hide” any assets from other members of the household. The questionnaire also included a detailed network roster that allowed for the identification of up to 2 non-household members, including the person’s sex, age, and relationship to the respondent, vis-à-vis joint ownership of an asset, from whom an asset was acquired and from whom permission/consent was needed to exercise a right to an asset.

18. Several implications for piloting the modules on asset ownership and control in 2015 emerged from a preliminary analysis of the MEXA data. First, while it is useful from a research perspective to analyze patterns of joint ownership of assets and from whom women and men acquire assets, it is not necessary for pilot countries to include a detailed network roster, going forward. Second, because there is a strong correlation across all rights to an asset, and the rights to sell or bequeath an asset are the most robust forms of rights, it is necessary to collect information only on the rights to sell and bequeath, going forward. Third, although valuation data are prone to measurement error, pilot countries should still collect information on asset values to assess the feasibility and reliability of estimating gender wealth gaps via household surveys. Fourth, although a low incidence of “hidden” assets was observed in Uganda across all assets except financial assets and liabilities, countries conducting stand-alone pilot surveys in 2015 should collect information on “hidden” assets to assess whether this pattern holds elsewhere as well. Fifth, although the MEXA questionnaire is lengthy, on average, across treatment arms, it took about 30 minutes to complete the questionnaire.

Session 4. Lessons Learned from MEXA: Field Operations

19. Mr. Muwonge, of UBoS, and Ms. Moylan, of the World Bank, gave a presentation on implementing MEXA. The implementation period ran from April to August 2014. It included a three-week training of enumerators that covered the questionnaire, interview settings and respondent sensitization (five days); the CAPI software (five days); field testing the questionnaire (three days); and survey management (two days). It was noted that the appropriate length of the training for pilot countries in 2015 will depend in part on whether countries: will be conducting stand-alone surveys or appending a module to an existing household survey; and using the CAPI platform or paper questionnaires.

20. Data collection lasted approximately two and a half months. Seven mobile field teams were deployed, each comprising one supervisor, two male enumerators and two female enumerators. Factors determining the appropriate field team composition included the regional and linguistic backgrounds of the enumerators; the sex of the enumerators as attempts were made to match female (male) enumerators with female (male) respondents; and a sufficient number of enumerators per team to conduct up to four interviews simultaneously in treatment arms 4 and 5.

Fully-staffed field teams spent, on an average, two days in each enumeration area, while teams with less enumerators spent up to three days in each EA.

21. The following field operation challenges were identified by the field teams: (1) approaching communities and respondents as some respondents were suspicious about the survey and hesitant to provide information, such as on formal ownership and the value of assets; (2) finding respondents at home, particularly in urban areas; (3) administering treatment arm 3 because it was difficult to find the principal couple home together; administering the interviews simultaneously in treatment arms 4 and 5 and finding the principal couple together in both urban and rural areas; and (4) collecting information on asset values because it requires a lot of sensitising and probing of respondents and the information cannot be objectively verified.

22. Other challenges noted by UBoS include the need to fix an appointment with the sample household in order to interview the principal couple together for treatment arm 3, which increases field days and costs and the difficulties of implementing treatment arm 2 if the wife is randomly selected for the interview but her husband is not agreeable to her being interviewed. The importance of sensitizing the public, including local leaders, to the survey objectives was underscored given the sensitivity of the information being asked.

Session 5. Findings from MEXA

23. Mr. Kilic, of the World Bank, presented the empirical approach and findings of MEXA. The analysis prioritized the following four modules: dwellings, agricultural land, non-farm enterprises and financial assets. The selection of the priority modules for analysis was done jointly with the EDGE team, and was informed by the finding from the Gender Asset Gap project that across Ecuador, Ghana and India, the majority of wealth was concentrated in dwellings, agricultural land and non-farm enterprises. The focus on financial assets was based on its cross-country applicability.

24. Eight primary and 3 secondary dependent variables were analysed in each of the 4 priority modules. The primary dependent variables are all dichotomous, and identify, for a given asset category, whether: (1) an individual is a *reported* owner of at least 1 asset; (2) an individual is an *exclusive reported* owner of at least 1 asset; (3) an individual is a *joint reported* owner of at least 1 asset; (4) an individual is an *economic* owner of at least 1 asset; (5) an individual is an *exclusive economic* owner of at least 1 asset; (6) an individual is a *joint economic* owner of at least 1 asset; (7) an individual has the right to *sell* at least 1 asset (irrespective of the reported need to obtain consent/permission from anyone else); and (8) an individual has the right to *bequeath* at least 1 asset (irrespective of the reported need to obtain consent/permission from anyone else). The secondary dependent variables are all continuous, computed via principal components analysis in each asset category, over: (1) 5 binary variables that identify whether an individual, for at least 1 asset and irrespective of the need to obtain consent/permission, has *any*

right to (i) sell, (ii) bequeath, (iii) rent out, (iv) use as collateral, and (v) make improvements/invest; (2) 5 binary variables that capture whether an individual, for at least 1 asset and irrespective of the need to obtain consent/permission, has the *exclusive* right to (i) sell, (ii) bequeath, (iii) rent out, (iv) use as collateral, and (v) make improvements/invest; and (3) 5 binary variables that capture whether an individual, for at least 1 asset and irrespective of the need to obtain consent/permission, has the *joint* right to (i) sell, (ii) bequeath, (iii) rent out, (iv) use as collateral, and (v) make improvements/invest. Probit and Ordinary Least Squares (OLS) regressions were estimated for binary and continuous dependent variables, respectively.

25. In his discussion of the findings, Mr. Kalic focused on the female sub-samples. For dwellings, the individual incidence of ownership, whether reported or economic, is higher in Arms 4 and 5, compared to Arm 1, taking individual reporting as is. These findings are true for the analysis of joint ownership as well. While Arm 3 treatment is associated with a higher rate of individual *reported* overall and joint ownership compared to Arm 1, the same effect is not present in the analysis of *economic* ownership. Assuming presumed most knowledgeable member reporting to override other respondents' reporting in Arms 4 and 5, these effects, in comparison to Arm 1, cease to be statistically significant.

26. For agricultural land, the individual incidence of *reported* ownership is higher in Arms 4 and 5, compared to Arm 1, taking individual reporting as is. These findings are true for the analysis of joint ownership as well. Regarding economic ownership, the positive treatment effect is associated only with Arm 4, on the whole and for joint ownership. Assuming presumed most knowledgeable member reporting to override other respondents' reporting in Arms 4 and 5, the effects cease to be statistically significant. No treatment effects are associated with Arm 3.

27. For financial assets, taking individual reporting as is, the incidence of *reported* ownership is higher in Arm 4, compared to Arm 1, whether on the whole, exclusive or joint. Assuming presumed most knowledgeable member reporting to override other respondents' reporting in Arms 4 and 5, the effect ceases to be statistically significant.

28. Finally, no statistically significant treatment effects were associated with Arm 2, compared to Arm 1, in the estimations.

Session 6: Implications of MEXA for Pilot Countries

29. Following Mr. Kilic's presentation, Ms. Pandolfelli of UNSD, summarized the key findings and presented the recommended interview setting for pilot data collection in 2015. As compared to the standard practice of interviewing the self-identified most knowledgeable household member or head of household:

- There is clear value addition to interviewing more than one adult household member, as reflected in a higher incidence of women's asset ownership and control.
- Interviewing a member of the principal couple selected randomly does not yield statistically significant effects.
- Interviewing the principal couple together only yields a statistically significant higher incidence of reported joint ownership by women. No effects are observed across the other priority assets.
- The effects of treatment arms 4 and 5 are statistically indistinguishable from one another, but arm 4 enables aggregation of assets at the household level for SNA household sector accounts purposes because it collects data on a full inventory of household assets.
- The sample size composition is not large enough in treatment arm 4 to statistically quantify the marginal gains of interviewing members of the household in addition to the principal couple.

30. In light of these findings, the EDGE project recommended that pilot countries interview up to 4 adult household members in order to validate MEXA's findings in other countries. If the household has a principal couple, the couple should be interviewed separately, at the same time. The additional number of adult household members to interview in each country will depend on the household population dynamics of the country, more specifically on the average adult household size. To this end, pilot countries were requested to make available the distribution of households by size and by number of adult household members.

31. Following the recommendation, meeting participants broke into groups to discuss the feasibility of integrating the recommended interview setting into their existing survey programs and then reported their conclusions to the plenary session.

32. Most countries in attendance (Ghana, Maldives, Mexico, Philippines, Republic of Korea, South Africa, Swaziland, and Uganda) reported that they have experience interviewing more than one adult household member, but not simultaneously. All countries indicated that it would be feasible to interview up to 4 adult household members for the EDGE pilot. Challenges would include: interviewing women alone in certain countries, such as some regions of Fiji and Swaziland, especially given the difficulty of hiring female enumerators; finding more than 1 adult household member at home to interview, such as in rural parts of China due to urban migration; and getting household members together at the same time for simultaneous interviews. All countries in attendance suggested that the recommended methodology would be feasible to implement beyond the pilot so long as policymakers understand the importance of collecting the data and thus, accord it funding. This requires sensitization at both the national and local levels.

Session 7. EDGE Draft Methodology on Measuring Entrepreneurship from a Gender Perspective: Defining Entrepreneurship

33. First, the presentation, made by Mr. Singh of UNSD, provided a summary of the key discussion points and outcomes of the 1st EDGE Technical Meeting on Measuring Entrepreneurship from a Gender Perspective. Held in New York in December 2013 and attended by representatives of the NSOs of Georgia, Ghana, India, Mexico, Philippines and the USA, as well as regional agencies and academics, the objectives of the 1st EDGE technical meeting were twofold: to take stock of existing data and research on gender and entrepreneurship; and to identify EDGE's methodological contribution to measuring entrepreneurship from a gender perspective. It was agreed in New York that the proposed EDGE methodology should build on existing data collection instruments to ensure the sustainability of data collection and prioritise population-based data collection since most women entrepreneurs are concentrated in micro/small household based enterprises and an entrepreneurship module can be piloted in conjunction with the assets modules in 2015. Also, the EDGE definition of entrepreneurship should strike a good balance between a broad definition that includes people without entrepreneurial traits and a narrow definition that excludes individuals within the target group for women's empowerment.

34. Second, the presentation introduced the draft EDGE methodology on measuring entrepreneurship from a gender perspective, written in collaboration with the OECD. The proposed operational definition of an entrepreneur under the EDGE project is "those persons who have direct control over the activities of an enterprise they own alone or with other individuals." The owners of economic units producing goods and services intended for their own final use are not considered entrepreneurs. UNSD noted four issues for deliberation concerning the proposed definition: first, whether to restrict entrepreneurs to those working for their enterprise as their main occupation, a restriction meant to minimize type II error but that may prove too restrictive; second, whether to impose an ownership-size threshold, or upper bound, since defining the "gender" of an enterprise owned by a large number of people with complex ownership structures is challenging and may not be meaningful from a gender perspective; third, whether to treat all self-employed as entrepreneurs or exclude the dependent self-employed and pure own account workers; and fourth, how to operationalize main intention given that under the 19th ICLS Resolution, the main intended destination of production determines employment status.

Session 8. New International Standards on Measuring Work and Employment

35. Mr. Walsh, of the ILO, presented an overview of the new ICLS resolution on work, employment and labour underutilization and its implications for the measurement of entrepreneurship. He noted that the new ICLS Resolution makes no reference to

entrepreneurship but will improve the overall framework of information available on activities of all workers in all forms of work. Further, the International Classification of the Status of Employment will be reviewed over the next few years and the relevance of entrepreneurship will be evaluated. The ILO's high priority to develop more regular labour force statistics and more regular surveys also create a platform for the measurement of related concepts, such as entrepreneurship. There is a need though to consider whether measures of entrepreneurship require regular or irregular measurement. Regarding the operationalization of the main intended destination of production, the ILO will be piloting modules in 2015 in which respondents self-report the main intention at the time of interview.

Session 9. EDGE Draft Methodology on Measuring Entrepreneurship from a Gender Perspective: Conceptual Framework and Key Indicators

36. Ms. Pandolfelli, of UNSD, presented a conceptual framework and key indicators for measuring entrepreneurship from a gender perspective under the proposed EDGE methodology. Meant to orient consistent, comparable and relevant data collection on gender and entrepreneurship, the conceptual framework provides a comprehensive description of gender differentials in two main sets of entrepreneurial outcomes: entrepreneurial participation and entrepreneurial performance. In order to help decision-makers understand the main individual and contextual drivers of observed gender differences in these outcomes, drivers of gender gaps are categorized by those linked to motivational and aspirational differences and those linked to the gender-unequal availability of entrepreneurial resources and constraints. Measuring both drivers and outcomes under the EDGE initiative should facilitate analysis of the socio-economic impacts of women's entrepreneurship, including employment creation, growth with poverty reduction, and women's empowerment. For each of the four dimensions of the conceptual framework, key indicators were proposed as well as the appropriate data source for measuring them (e.g. household or enterprise survey) and their current availability.

Session 10. EDGE Draft Methodology on Measuring Entrepreneurship from a Gender Perspective: Data Collection Strategies

37. Mr. Singh, of UNSD, presented data collection strategies for measuring entrepreneurship from a gender perspective. The proposed EDGE methodology uses a two-pronged approach to improve the relevance of entrepreneurship data for gender analysis at the national level and to increase the international comparability of existing data. First, very limited adjustments in existing household and firm level data collections are suggested to produce globally comparable measures of women's participation in entrepreneurship. Second, more resource-intensive solutions are proposed for countries wishing to produce comprehensive measures of the determinants, outcomes and impacts of entrepreneurship.

38. The presentation proposed three options for building on existing household data collection: (1) adding two internationally standardised questions to labour force or other household surveys that distinguish enterprise owners (with and without employers) from the broader set of the self-employed; (2) adding roughly 6 to 8 questions to labour force or other household surveys asked of all individuals who jointly own an enterprise that identify primary ownership and management; and (3) adding a full module on entrepreneurship to labour force or other household surveys that enable the measurement of the four dimensions of the EDGE conceptual framework -motivations and aspirations, entrepreneurial resources and constraints, entrepreneurial participation and enterprise performance. Three options were also proposed for building on existing firm level data collection: (1) adding one question to existing enterprise surveys to identify the main owner (and sex) of the enterprise; (2) adding an ownership module to existing enterprise surveys with questions on the gender, ownership shares and other characteristics of the four main enterprise owners, the average hours spent working on the enterprise, prior management experience, management responsibilities, and financial control; and (3) canvassing an internationally harmonised enterprise survey linked to a country's business register.

Session 11. MEXA Entrepreneurship Module

39. Ms. Pandolfelli, of UNSD, presented a detailed review of the entrepreneurship module canvassed in the Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective in Uganda. Preliminary analysis of the data found that the item non-response rate was near negligible across the module and that there were very few inconsistencies for the question in which respondents were asked to record the percentage of ownership for up to six joint owners of an enterprise. The presentation concluded that highly relevant information on gender and entrepreneurship can be collected via a well-designed full module on entrepreneurship appended to a household survey.

Session 12. Group Discussion: Assessment of Proposed Entrepreneurship Methodology

40. Following the presentation by Ms. Pandolfelli, meeting participants broke into groups to discuss the theoretical relevance and feasibility of implementing the proposed EDGE methodology on measuring entrepreneurship from a gender perspective and then reported their conclusions to the plenary session. The following feedback was provided:

On defining entrepreneurship:

41. Overall, meeting participants agreed that the definition of entrepreneurship should exclude the dependent self-employed and pure account workers because these persons do not take risks, innovate or have other entrepreneurial characteristics. There was also agreement that the definition should not be restricted to main occupation entrepreneurs and that indicators should be generated for both entrepreneurs engaged in an enterprise as their main occupation and

entrepreneurs engaged in an enterprise as a secondary activity. Most participants felt that imposing an upper bound on the ownership size of enterprises is theoretically relevant but will be challenging to operationalize. A suggestion was made to focus on the sex of the founders, not the owners, of large corporations. Finally, it was noted that the proposed EDGE definition defines people (entrepreneurs), not entrepreneurial activities that classify people as entrepreneurs. A suggestion was made to define entrepreneurial activities instead of persons given the challenges of quantifying entrepreneurial traits.

On proposed EDGE conceptual framework:

42. Overall, meeting participants were in agreement with the proposed EDGE conceptual framework for measuring entrepreneurship from a gender perspective. A suggestion was made to add a dimension on the “enabling environment” for entrepreneurship (i.e. the socio-cultural and political environment such as existing laws or policies that give incentives to female entrepreneurs).

On proposed key indicators:

43. Meeting participants suggested that not all of the indicators presented by the EDGE project to measure entrepreneurship from a gender perspective are quantifiable, such as the indicators on necessity-based entrepreneurship and enterprise satisfaction. Concern was also expressed about the feasibility of measuring some indicators via household surveys given that they would require very large sample sizes to ensure reliable estimates. It was emphasized that access to all types of credit, not just formal credit, is important, and the relevant indicator on credit should be reformulated to reflect this. All meeting participants agreed that given the large number of indicators proposed for measurement, EDGE needs to prioritize them and present a core set of indicators that should be collected. The project also needs to give guidance on the frequency of data collection

On proposed data collection strategies:

44. Overall, representatives of the NSOs present at the meeting reported that they would prefer adding a few questions, rather than appending a full module, on entrepreneurship to an existing labour force or household surveys due to resource constraints and because labour force and other household surveys are already overburdened.

On the full entrepreneurship module canvassed in MEXA:

45. Participants expressed concern with how the module operationalizes necessity-based and opportunity-based entrepreneurship by asking respondents their main motivation for starting an

enterprise as this is a subjective question and there could be many main motivations. In response, it was noted that this question has been tested by, and is now routinely included in, the Global Entrepreneurship Monitor (GEM) and the Flash Eurobarometer Survey on Entrepreneurship, two of the most cited sources of entrepreneurship data, as well as official surveys in Mexico and Ghana. It was emphasized that the notion of direct control of jointly-owned enterprises needs to be better clarified and operationalized. Finally, it was noted that obtaining good estimates of enterprise earnings is very challenging, as it is consistently underestimated, and several participants questioned whether asking a direct question on reported earnings is sufficient. While asking a detailed set of accounting-related questions on revenues and costs is an alternative approach to calculating earnings, this approach would require the addition of several questions to an already lengthy module. Further, many micro and small enterprises covered in household surveys do not keep formal accounting records.

Session 13. Pilot Country Preparation

46. NSOs piloting data collection for the EDGE project in 2015 presented their proposed implementation plans and timelines of activities (see table below) as indicated in their pre-meeting assignment submissions (see Annex III for questionnaire). National Statistical Offices of Georgia, Ghana, Mongolia, Philippines and South Africa will pilot stand-alone surveys whereas Mexico and Maldives will append a module to an existing household survey. Because Fiji and Swaziland are new to the EDGE project, in early 2015 they will determine whether to pilot a stand-alone survey or a module and the related timeline of activities.

Timeline of Activities in 2015 for EDGE Pilot Countries

Activity, 2015	Fiji	Georgia	Ghana	Maldives	Mexico	Mongolia	Philippine	South Africa	Swaziland
Modification of EDGE modules to country context	TBD	Mar-Apr	Jan	Jan-Mar	Jan-Feb	Jan-Mar	Jan-Mar	Apr	Feb-Mar
Translation of modules into local languages, if applicable	TBD	NA	NA	Feb-Apr	NA	Jan-Apr	March	May	Mar-Apr
For stand-alone surveys, sample design	TBD	Mar-Apr	Jan		NA	Jan-Apr	Feb		Mar-Apr
Drafting of enumerator training manual	TBD	Mar-Apr	Jan-Feb	Mar-May	Mar-Apr	Jan-Apr	Feb-Mar	May	Apr-May
Training of enumerators, including pre-test of EDGE modules	TBD	May	Feb	Jun-Jul	June	May	April	Jun-Jul	Jun
Field work/data collection	TBD	Jun-Jul	Mar	Aug-Oct	3 rd quarter	Jun	May	Aug	Jul-Oct

Data entry/processing and preparation of data for analysis	TBD	Aug-Sept	Feb-Mar	Sept-Nov	3 rd quarter	Jun-Aug	Jun-Jul	Sept	Jul-Oct
Tabulation of EDGE indicators	TBD	Nov	Apr	Dec	NA	Oct	Aug	Sept-Oct	Nov
Drafting of report on lessons learned from pilot data collection	TBD	Dec-Mar2016	May-Jun	Dec	Nov	Dec-Mar2016	Sept-Oct	Nov-Dec	Dec

47. All NSOs requested from EDGE a draft training manual, tabulation plan and final report template to assist them in the pilot data collection.

Session 14. Conclusions and the Way Forward

48. In concluding the meeting, the following “next steps” were agreed to:

- EDGE will circulate the draft report of the Midterm Review Technical Meeting to the participants for their feedback (January 2015);
- Pilot countries will share with EDGE the distribution of households by size, by number of adult household members and by households with at least one principal couple in order to ensure that the sampling strategy for countries conducting stand-alone surveys includes a sufficient number of households from each size class to unpack the marginal gains of interviewing up to four household members (January 2015);
- EDGE will review those questions identified as problematic in the entrepreneurship module included in MEXA and make necessary revisions for inclusion in the pilot surveys (January 2015);
- For those pilot countries appending the modules on asset ownership to an existing household survey in 2015, EDGE will disseminate a minimal and core set of questions for inclusion (January 2015).
- EDGE will share MOU templates with pilot countries and request revised budget estimates for the pilots in light of the new recommendation to interview up to 4 adult household members, simultaneously (January-February 2015);
- EGDE will revise the guidelines on measuring entrepreneurship from a gender perspective and circulate them to meeting participants for their feedback. Revisions will include prioritizing and recommending a core set of indicators to be measured and recommending how often the data should be collected (1st half of 2015).

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United Nations Statistics Division
In collaboration with
UN Women

EDGE Project
Midterm Review Technical Meeting
Kitakyushu-city, Japan
3 – 5 December 2014

Agenda

The United Nations Statistics Division (UNSD) and the United Nations Entity for Gender Equality and the Empowerment of Women (UN Women), in collaboration with the Kitakyushu Forum on Asian Women, are organizing a Midterm Review Technical Meeting of the Evidence and Data for Gender Equality (EDGE) initiative.

The meeting will bring together national statisticians, regional commissions and partner agencies to take stock of progress made by the EDGE initiative on measuring individual level asset ownership and entrepreneurship from a gender perspective.

During this three-day technical meeting, participants will:

- Review and discuss the findings of the EDGE Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective (MEXA) with regards to whom in the household should be interviewed for collecting reliable data on the ownership, control and valuation of assets at the individual level;
- Review and discuss the draft methodology on measuring entrepreneurship from a gender perspective prepared under the EDGE project in collaboration with the OECD;
- Discuss country preparation and share lessons learned for piloting data collection on asset ownership and entrepreneurship under the EDGE initiative in 2015.

The key objectives of the meeting are to:

- Promote the integration of a gender perspective into national statistical systems with the aim of improving the availability and quality of gender statistics, including statistics on the “emerging issues” of asset ownership and entrepreneurship;
- Update participants on the progress made by the EDGE initiative to advance methodological development on measuring asset ownership and entrepreneurship from a gender perspective;
- Receive feedback from national statisticians on the feasibility of implementing the recommendation(s) made by the EDGE Methodological Survey Experiment with regards to whom in the household should be interviewed about the ownership, control and valuation of assets at the individual level;
- Receive feedback from national statisticians on the applicability and feasibility of the methodology proposed under the EDGE project to measure entrepreneurship from a gender perspective;
- Ensure that country implementation plans are in place for piloting data collection on asset ownership and control under the EDGE initiative during 2015.

3 December 2014 (Wednesday)

09.00 – 09.30 **1. Welcome (UNSD, Kitakyushu Forum on Asian Women, All)**

Objectives of the meeting
 Short round table introduction
 Adoption of the agenda

09.30 – 10.00 **2. EDGE Overview (UN Women)**

The session provides an overview of the EDGE project, including the Minimum Set of Gender Indicators.

10.00 – 11.00 **3. MEXA overview and questionnaire construction (UNSD)**

The session will provide an overview of the Methodological Experiment on Measuring Asset Ownership from a Gender Perspective and a detailed discussion of the questionnaire used in MEXA, highlighting modules and questions that worked well or posed challenges, and how they can be modified for pilot data collection activities.

11.00 – 11.15 Coffee break

11.15 – 12.15 **4. Lessons learned from MEXA: field operations (UBoS, World Bank)**

The session will discuss the implementation of MEXA. Topics to be discussed include:

1. Special considerations for training enumerators to collect data on asset ownership from a gender perspective
2. Interview team compositions
3. Protocols for difficult field scenarios
4. Unanticipated challenges encountered in the field and solutions

12.15 – 13.15 Lunch break

13.15 – 14.45 **5. Findings from MEXA (World Bank)**

In collaboration with the World Bank Living Standards Measurement Study (LSMS) and the Uganda Bureau of Statistics (UBoS), the EDGE initiative conducted a Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective (MEXA) in Uganda in 2014 to test different household interviewing settings for collecting individual-level asset data. The session will present the findings of MEXA.

14.45 – 15.00 Coffee break

15.00 – 17.00 **6. Group discussion: implications of MEXA for Pilot Countries (All)**

Participants will break into working groups to discuss the implications of the findings and lessons learned from MEXA for piloting data collection in 2015, including the feasibility of implementing the recommended interview setting

4 December 2014 (Thursday)

09.00 – 9.45 **7. EDGE draft methodology on measuring entrepreneurship from a gender perspective: defining entrepreneurship (UNSD)**

The session will provide a summary of the key issues discussed at the first EDGE technical meeting on entrepreneurship and introduce the draft EDGE Technical Report on Measuring Entrepreneurship from a Gender Perspective, including a proposed operational definition for measurement.

9:45 – 10.30 **8. New international standards on measuring work and employment (ILO)**

The session will present new concepts and standards for measuring work, employment, unemployment and labour underutilization according to the 19th ICLS Resolution as well as their implications for the measurement of entrepreneurship under the EDGE initiative.

10.30 – 11.15 **9. EDGE draft methodology on measuring entrepreneurship from a gender perspective: conceptual framework and key indicators (UNSD)**

The session will present a conceptual framework on gender and entrepreneurship and propose key indicators for measurement.

11.15-11.30 Coffee break

11.30 – 12.30 **10. EDGE draft methodology on measuring entrepreneurship from a gender perspective: data collection strategies (UNSD)**

The session will propose new data collection strategies for measuring entrepreneurship from a gender perspective via household surveys, enterprise surveys and business registers.

12.30 – 14.00 Lunch break

14.00 – 15.00 **11. MEXA entrepreneurship module (UNSD)**

The session will provide a detailed review of the module on entrepreneurship included in the MEXA questionnaire, including a mapping of specific questions to the conceptual framework and indicators proposed in the EDGE methodology.

15.00 – 17.00 **12. Group discussion: assessment of proposed entrepreneurship methodology (UNSD, All)**

The session will consist of working groups discussing and summarizing additions and changes to the proposed methodology on measuring entrepreneurship from a gender perspective to ensure that the EDGE guidelines include concepts, methods and indicators that are theoretically relevant and practical and feasible for national statistical offices.

5 December 2014 (Friday)

09.00 – 12.00 **13. Pilot Country Preparation (ADB, Pilot countries)**

(w/ coffee br.)EDGE pilot countries will share their implementation strategies for data collection.

Through this session, participants will explore ways of strengthening collaboration among stakeholders in the development of gender statistics on asset ownership and entrepreneurship. Topics to be discussed include:

1. Timeline of activities, including planning and preparatory activities, pilot surveys, and post pilot activities
2. Additional technical assistance required from the EDGE initiative
3. Establishing an EDGE forum to share information and experiences during data piloting in 2015

12.00-13.00 Lunch break

13.00-14.00 **14. Conclusions and the way forward (UNSD)**

14.00 Field visit (TBD)

Pre-meeting Assignment for the EDGE Midterm Review Technical Meeting

UN Statistics Division and UN Women
3-5 December 2014, Kitakyushu-city, Japan

In preparation for the meeting, please answer the following questions.

Please type your answers and submit the completed document in electronic format to yarashuk@un.org by **Friday, 21 November 2014**.

Thank you in advance for your input.

Questions on EDGE Pilot Implementation Plans

1. Please list the members of your country's EDGE pilot team, including their names, contact information and responsibilities on the team:

2. Will your country be appending the EDGE modules on asset ownership and entrepreneurship to an existing household survey or conducting a stand-alone survey?

Existing household survey Stand-alone survey > skip to Qst. 4

3. Indicate the name of the household survey to which the EDGE modules will be appended: _____

4. For each activity listed below, please indicate the tentative month in 2015 in which the work will take place:

Activity	Month(s), 2015
Modification of EDGE modules to country context	
Translation of modules into local languages, if applicable	
For stand-alone surveys, sample design	
Drafting of enumerator training manual	
Training of enumerators, including pre-test of EDGE modules	
Field work/data collection	
Data entry/processing and preparation of data for analysis	
Tabulation of EDGE indicators	
Drafting of report on lessons learned from pilot data collection	

5. Please specify the technical assistance needed from the UNSD EDGE staff to carry out your country implementation plan

Questions on the EDGE Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective (MEXA)

Please review the MEXA questionnaire provided with this pre-meeting assignment and answer the following questions:

6. The MEXA questionnaire uses four approaches to collect information on asset ownership:
- The first approach is to collect information on **reported ownership**, by asking the respondent to identify who owns the asset, either individually or jointly.
 - The second approach is to collect information on **documented ownership**, where applicable, by asking the respondent whether formal ownership documents exist for an asset and whose name(s) are listed as an owner on the documents.
 - The third approach is to collect information on **economic ownership**, by asking the respondent which person(s) would control the proceeds from the sale of the asset.
 - The fourth approach is to ask about particular **rights over an asset**, specifically the right to sell or bequeath an asset.

To the best of your knowledge, how relevant are these concepts of ownership to your country context? Explain:

7. Does your existing survey program regularly collect **individual-level** information on any of the physical or financial assets included in the MEXA questionnaire?

Yes No >Skip to Qst. 9

8. List the information collected:

9. Are there certain **modules** in the MEXA questionnaire that are **not** relevant to your country context?

Yes No >Skip to Qst. 11

10. List the modules that are **not** relevant and explain why:

11. Are there certain **questions** in the MEXA questionnaire that are **not** relevant to your country context?

Yes No >Skip to Qst . 13

12. List the questions (by number) that are **not** relevant and explain why:

13. Provide three examples of how the MEXA questionnaire will need to be modified to your country context:

14. **For those countries which are appending the EDGE modules to an existing household survey**, how do you propose to streamline/condense the MEXA questionnaire so that it can be appended to the household survey?

15. Provide any other comments you may have on the MEXA questionnaire below:
