



Measuring Asset Ownership and Entrepreneurship from a Gender Perspective: the EDGE Initiative

Social and Housing Statistics Section - UNSD



Outline

- Overview of the EDGE initiative
- Progress on measuring asset ownership from a gender perspective
- Progress on measuring entrepreneurship from a gender perspective
- Next steps
 - Pilot data collection in 2015
 - Methodological guidelines



EDGE overview

- 3-year joint initiative by UNSD and UN Women
- EDGE seeks to generate comparable gender indicators on health, education, employment, entrepreneurship, and assets
- Builds on the work of the Inter-agency and Expert Group on Gender Statistics (IAEG-GS)
- Overseen by Steering Committee
- Funded by Australia, Canada, Ireland, Rep. of Korea, USA
- Partners include ADB, AfDB, FAO, OECD, and World Bank

EDGE overview (cont'd.)



Specific objectives:

- Compile and disseminate online international data and metadata on education, employment, and health
 - ✓ 35 quantitative and 9 qualitative indicators available online at: genderstats.org
- **Undertake methodological work:**
 - Develop guidelines to measure individual level asset ownership and entrepreneurship from a gender perspective
 - Pilot guidelines in selected countries
 - Present guidelines to UN Statistical Commission



Measuring asset ownership from a gender perspective



What is an asset?

- As defined in the System of National Accounts (SNA 2008)
 - store of value representing benefits accruing to the economic owner by holding or using it over a period of time. It is a means of carrying forward value from one accounting period to another (para 10.8).



Why measure asset ownership?

- Assets have intrinsic and instrumental value
 - Generate income
 - Facilitate access to capital and credit
 - Buffer against shocks
 - Means of wealth accumulation
 - Provide status and security
- Traditional poverty studies: poverty as lack of income or consumption
- Asset-based poverty studies focus on accumulation of stock of assets over life cycle
 - Better understanding of poverty traps



Why measure asset ownership at the individual level?

Until recently most assets studies have collected data at household level. Yet...

- Most assets are owned by individuals, whether solely or jointly
- Women and men may not have same access to assets in household
- All members do not benefit equally from “household assets”
- Women and men use, acquire and dispose of assets differently



Policy relevance of measuring asset ownership from a gender perspective

- Individual asset ownership is related to:
 - Women's and children's well-being
 - Women's fall-back position:
 - how well off they would be in case of household dissolution (separation, divorce, widowhood, choice of whether to marry)
 - Women's bargaining position within household

Progress, measuring asset ownership (cont'd.)



- Draft Technical Report on *Measuring Individual Level Asset Ownership and Control* commissioned by EDGE in 2013
- Proposed methodology discussed at 2nd technical meeting, Bangkok, Jul-Aug 2013
 - Attended by representatives of NSOs of China, Georgia, Ghana, Maldives, Mongolia, Philippines, Rwanda, Uganda and Vanuatu as well as UNESCAP, FAO, regional banks and donor agencies

2nd Technical Meeting: main items discussed



- Which assets to measure?
 - Land: agricultural + non-agricultural
 - Dwelling for principal residence
 - Other real estate
 - Non-farm enterprise assets
 - Livestock
 - Agricultural equipment
 - Financial assets (incl. liabilities)
 - Valuables

2nd Technical Meeting: main items discussed (cont'd.)



How to measure ownership?

- Ownership conceptualized as a **“bundle” of rights**
 - Includes rights to alienate and manage assets and use benefits accruing from assets
- Bundle of rights may not be vested in one person
 - Women may have, e.g.:
 - access to asset but no formal ownership
 - formal ownership but no control over asset
 - How rights are vested varies across contexts



How to measure ownership (cont'd.)

- Reported ownership
 - who is identified as the owner(s)?
- Legal ownership, where applicable
 - whose name(s) is listed as the owner on document?
- Economic ownership
 - who derives economic benefit from sale of asset?
- Rights to assets
 - right to sell
 - right to bequeath

2nd Technical Meeting: main items discussed (cont'd.)



Who to interview?

- Will interviewing head of household or most knowledgeable member yield accurate information on asset ownership, control and valuation?
- Should principal woman always be interviewed?
- No systematic studies on these questions
- ✓ **Recommendation by NSOs to test household interview settings**

MEXA



- Methodological Survey Experiment on Measuring Asset Ownership from a Gender Perspective
- Collaboration between EDGE, World Bank, and UBoS
- Implemented in Uganda in 2014
 - 136 enumerations areas, > 2000 households
 - Field operations concluded in mid-August
 - Analysis in progress
- Findings to:
 - Inform pilot data collection in 2015
 - Inform final methodological guidelines



Testing five interview settings

1. **Most knowledgeable** HH member, interviewed alone, asked about assets **all HH members** exclusively/jointly own
2. **Member** of principal couple randomly selected, interviewed alone, asked about assets **all HH members** exclusively/ jointly own
3. Principal couple, **interviewed together**, asked about assets **all HH members** exclusively/jointly own
4. Adult (18+) HH members, each interviewed alone, asked about assets **all HH members** exclusively/jointly own
5. Adult (18+) HH members, each interviewed alone, asked only about assets **respondent** exclusively/jointly owns



Measuring entrepreneurship from a gender perspective

Why measure entrepreneurship from a gender perspective?



- Existing research finds that gender is relevant to:
 - Determinants of entrepreneurship
 - Characteristics and performance of enterprises
 - Measures of success
- Policy relevance:
 - Better understanding of how to foster and sustain women's entrepreneurial activity
 - Better understanding of how women contribute to the economy



Progress, measuring entrepreneurship

1st Technical Meeting, December 2013, NY

- Attended by NSOs of Georgia, Ghana, India, Mexico, Philippines, USA, as well as UNECLAC, UNECA, FAO, OECD, World Bank, regional banks and researchers
- Objectives:
 - To take stock of existing data and research on gender and entrepreneurship
 - To identify EDGE's methodological contribution to measuring entrepreneurship from a gender perspective



Main items discussed at meeting

- Defining entrepreneurship:
 - Who is an entrepreneur?
 - Little convergence on definitions among researchers
 - While there is agreement on the typical traits of ‘entrepreneurs’- **willingness to take risk, innovate, problem solve**- these concepts are difficult to operationalize



Main items discussed (cont'd.)

- Classifications for facilitating a gender analysis of entrepreneurship:
 - Necessity-based and opportunity-based entrepreneurs
 - Formal and informal enterprises
 - Own account and employer enterprises
 - Nascent, new, and established enterprises
 - Type of economic activity enterprise is engaged in



Main items discussed (cont'd).

- Data sources: labour force and household surveys
 - **Advantages**
 - High quality and timely
 - Good international coverage
 - **Limitations**
 - No information on business other than size and sector of activity
 - Comparability challenges (treatment of incorporated self employed)



Main items discussed (cont'd.)

- Data sources: enterprise surveys
 - **Advantages**
 - More suitable than population surveys to analysis of performance differences in firms owned and controlled by women and men
 - **Limitations**
 - Limited availability of comparable business surveys with information on owners;
 - Very small businesses might not be covered



Main items discussed (cont'd.)

- Data sources: business registers
 - **Advantage:**
 - Less costly to produce entrepreneurship statistics from business registers than from sample surveys
 - **Limitations:**
 - Limited availability of linked business and population registers
 - May be problematic to assign ownership based on the name of the owner listed in register
 - Non-registered businesses excluded



Implications for EDGE initiative

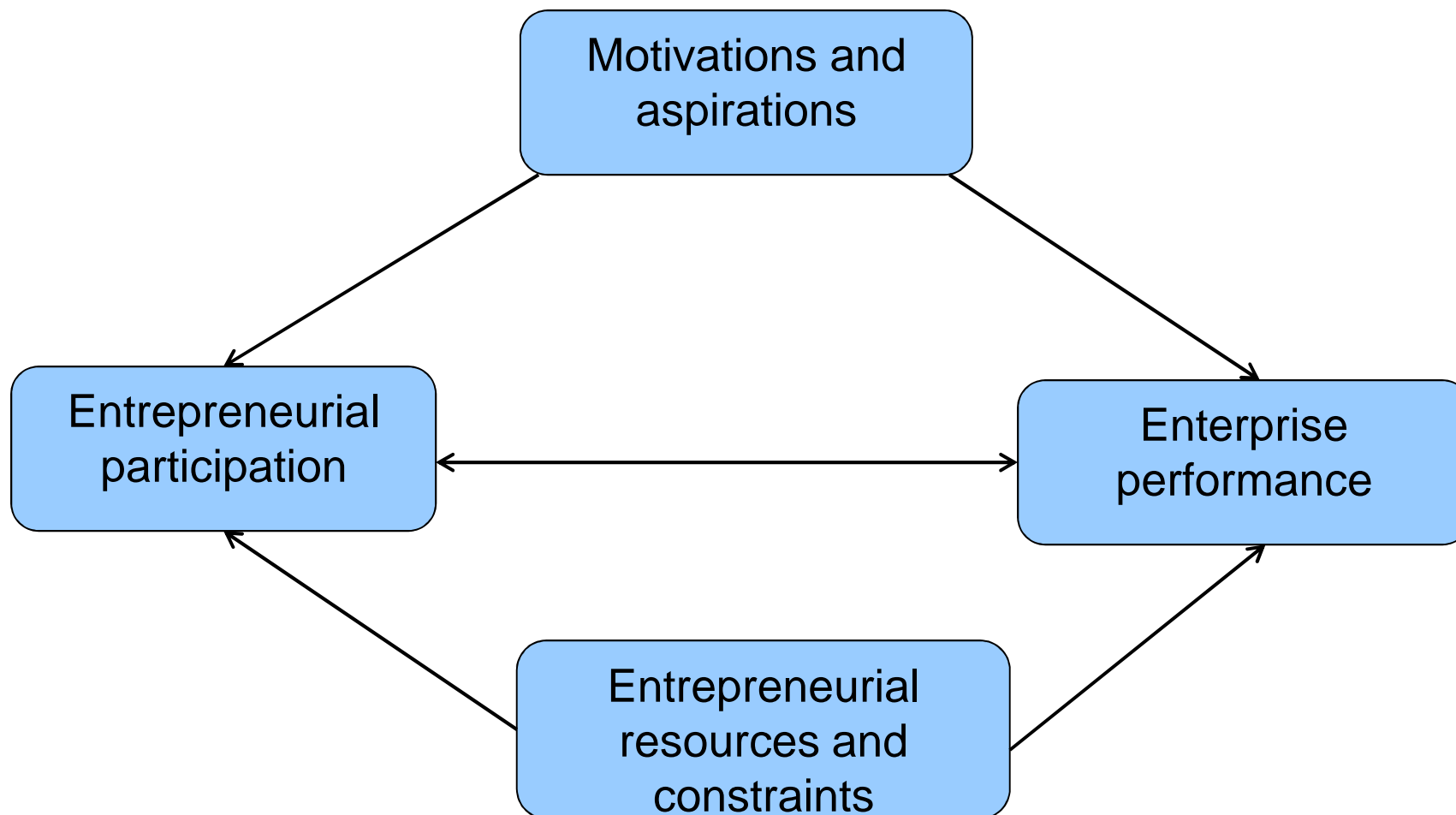
EDGE operational definition of entrepreneurs:

Those persons who have direct control over the activities of an enterprise by owning the totality or significant share of the business. The owners of enterprises producing goods and services intended for own final use are not considered entrepreneurs.

Employer entrepreneurs are those persons who employ at least one other person (OECD).



EDGE conceptual framework





EDGE methodological guidelines

- Collaboration between EDGE and OECD focusing on:
 - Minimum set of questions to add to LFS
 - Detailed entrepreneurship module to append to household survey
 - Inclusion of questions on ownership and management in on-going enterprise surveys
 - Design and content of a new firm-level survey
 - Strategies to increase relevance of business registers and economic censuses for gender analysis



Next steps



Pilot data collection

- Countries to collect data on asset ownership and entrepreneurship in 2015 via module appended to household survey or stand-alone survey
 - Fiji, Georgia, Ghana, Maldives, Mexico, Mongolia, Philippines, South Africa, Swaziland
 - Scope and coverage to be determined on country-by-country basis based on methodological/data gaps and policy needs
- Exploring possibility of piloting enterprise survey linked to business register in Georgia in 2015



Pilot data collection (cont'd.)

- Purpose of pilot data collection is to test the EDGE methodologies:
 - ✓ Validate concepts and measures
 - ✓ Refine questions
 - ✓ Assess interview setting
 - ✓ Identify tensions between questionnaires comparable across countries and questionnaires relevant to local country context



Next steps: refinement of guidelines

- Methodological guidelines on measuring asset ownership and entrepreneurship to be refined in 2015 based on lessons learned from pilot data collection
- Guidelines to be presented to UN Statistical Commission in 2016



Thank you!