UNITED NATIONS SECRETARIAT
Department of Economic and Social Affairs
Statistics Division

ESA/STAT/AC.122/14.2
December 2006
English only

Inter-Agency and Expert Group Meeting on the Development of Gender Statistics
12-14 December 2006
United Nations, New York

Poverty measurement and gender: Zimbabwe's experience *

Prepared by

Joyce Malaba
Independent Consulant, Statistician, and Researcher
Zimbabwe

* This document is being reproduced without formal editing.

Poverty measurement and gender: Zimbabwe's experience

LIST OF CONTENTS

List of Figures

List of Boxes

Acronyms

AIDS	Acquired Immuno Deficiency Syndrome
CSO	Central Statistical Office
CPI	Consumer Price Index
DFID	Department for International Development
DHS	Demographic and Health Survey
EMIS	Education Management Information System
FAO	Food and Agricultural Organisation
FPL	Food Poverty Line
FGT	Foster-Green -Thorbecke
GAD	Gender and Development
GDP	Gross Domestic Product
GFP	Gender Focal Points
HDI	Human Development Index
HIV	Human Immuno-deficiency Virus
HPI	Human Poverty Index
ICES	Income, Consumption and Expenditure Survey
MDG	Millennium Development Goals
MESC	Ministry of Education, Sport and Culture
MPSLSW	Ministry of Public Service, Labour and Social Welfare
NGO	Non Governmental Organisation
NHIS	Health Information System
PASS	Poverty Assessment Study Survey
TCPL	Total Consumption Poverty Line
UN	United Nations
UNICEF	United Nations Children's Fund
UNDP	United Nations Development Programme
UNIFEM	United Nations Development Fund for Women
UNFPA	United Nations Population Fund
WID	Women in Development
WHO	World Health Organisation

INTRODUCTION

This paper reviews the measurement of poverty and gender in Zimbabwe. It initially deals with the gender and poverty theory and then looks at the background to the gender and poverty nexus. The currently prevailing socio-economic situation in Zimbabwe is given. Zimbabwe's experience with regards to the estimation of poverty levels and the approaches used are presented followed by a critique of how well the gender dimension has been (is being) taken into account. Lastly, the challenges faced and the way forward are discussed. Detailed technical notes on the poverty measurement approaches used are given at the end of this paper, (MPSLSW, 2006).

1. GENDER AND POVERTY THEORY AND DISCOURSE

Gender is defined as a social construction and codification of the differences between the sexes and social relationship between women and men. Gender issues relate to all aspects of women's and men's lives, their different opportunities, access to resources and needs. (CSO, 1997). Thus gender is not natural or divine but is culturally constructed and it permeates all levels of society. It can therefore be deconstructed, reconstructed and transformed by society.

There are basically two approaches in gender discourse namely; the Women in Development (WID) and the Gender and Development (GAD). WID focuses on women as an analytic and operational category emphasizing the needs of women only. GAD on the other hand, examines the unequal relationships between women and men. Thus, GAD goes beyond WID by not only looking at the needs of women but also calling for the transformation of relationships and structures which promote gender inequality.

Poverty, on the other hand is a multidimensional phenomenon which in addition to low incomes is reflected in malnutrition; poor health; low literacy levels; low wages, lack of access to safe housing, water, sanitation and adequate clothing, housing and low living conditions etc. It is highly correlated with social exclusion, marginalization, vulnerability, powerlessness, isolation and other economic, political, social and cultural dimensions of deprivation, (MPSLSW, 1997). Poverty results from limited or no access to basic infrastructure and services, and is exacerbated by people's lack of access to productive resources such as land, credit, and also the lack of institutions, and other resources needed for sustainable livelihoods. The many dimensions of poverty make the money metric measures of poverty a necessary but not sufficient method of measuring poverty. It is for this reason that in the 1990s the United Nations came up with a more holistic method of measuring poverty using the human poverty/deprivation approach.

Poverty can be *structural/chronic* and/or *transient* and historically women have carried a heavier burden of both forms of poverty. Structural poverty is rooted in socio-economic, political and cultural institutions and is experienced over the long term and is often transferred intergenerationally. A typical example is provided by the majority of rural populations in developing countries with little or no access to land and other productive resources, facing chronic underemployment and/or unemployment. Gendered dimensions of structural poverty are often rooted in a legal and cultural framework which denies women access to productive resources. In contrast, transient poverty is due to cyclical or temporary factors and is experienced over shorter periods of time. Typical examples, include poverty induced by macro-economic policy shifts such as those experienced under economic reform programmes, natural disasters, cyclical unemployment, inflation, technological changes etc. It is important to note that structural and transient poverty often co-exist and are not mutually exclusive.

Women often carry the heaviest burden of transient poverty by virtue of their reproductive roles and/or household division of labour. Economic reforms have intensified their workloads by increasing their participation in formal and informal labour markets as well as shifting the burden of the care economy to

them. The latter has in recent years been exacerbated by the HIV and AIDS pandemic. Women often assume the responsibility of 'making ends meet' when real incomes fall and they do so by taking on several jobs, in both the formal and informal economic sectors, simultaneously. In short, women have assumed the 'safety net/cushion' role under harsh socio-economic adjustments or in situations were the economy is contracting.

Thus, gender is an essential concept for poverty analysis as well as the design and implementation of poverty reduction strategies. This is because both the causes and outcomes of poverty are heavily engendered and yet traditional policy formulation conceptualisations and practices fail to delineate and/or underplay poverty's gender dimensions.

2. THE BACKGROUND TO THE GENDER AND POVERTY NEXUS AND THE PREVAILING SITUATION IN ZIMBABWE

Zimbabwe is experiencing both structural and transient poverty. The dynamics of poverty in Zimbabwe are therefore very complex. Zimbabwe is a signatory to the Millennium Declaration of September 2000 which gave birth to the 2015 Millennium Development Goals (MDG) Agenda. The MDG framework is a poverty reduction and human development agenda. In domesticating the MDG agenda, Zimbabwe prioritised the following three goals in this order: Goal 1 *"Eradicate Extreme Poverty and Hunger"*; Goal 6 *"Combat HIV and AIDS, Malaria and other Diseases"* and Goal 3 *"Promote Gender and Empower Women"*.

According to the 1995 and 2003 National Poverty Assessments, poverty has increased in Zimbabwe. The percentage of the population below the TCPL rose from 55 percent in 1995 to 72 percent in 2003. If this trend continues Zimbabwe is highly unlikely to meet its 2015 target of halving this percentage to 36 percent. The percentage of the population below the Food Poverty line (FPL) also increased from 29 percent to 58 percent during the same periods. The 2015 target of 29 percent of the population below the FPL may only be met if there is an increase in agricultural productivity. (Poverty has become generalised in Zimbabwe as it increased more rapidly for urban areas than rural areas and also for male-headed households than female-headed ones respectively between 1995 and 2003). The prevalence of poverty among female-headed households was 48 percent in 1995 compared to 39 percent for male headed households in 1995, whilst in 2003 it was 68 percent for female headed compared to 60 percent for male headed households.

According to the Human Poverty Index (HPI) which is a more holistic measure of the multiple dimensions of poverty; deprivation as measured by the HPI increased from 23 percent in 1995 to 33 percent in 2003. The Zimbabwe 2015 MDG target is to halve human poverty to 17 percent. Zimbabwe's human development as measured by the Human Development Index (HDI) fell from 0.468 percent in 1995 to 0.410 percent in 2003 which signifies worsening human development. In 2003 the HDI for females (0.373) was lower than that of males (0.429) indicating the 'feminization of poverty'. Life expectancy estimated at 39 years in 2003 had dropped by 22 years from 61 years in 1990. This decline in life expectancy is largely attributed to the impact of the HIV and AIDS pandemic which has been exacerbated by widespread poverty which weakened the national and individual responses to the pandemic. Huge income differentials between females and males are also a major contributing factor to the feminization of poverty.

Zimbabwe has one of the highest levels of inequalities in the world. The inequalities have worsened from a Gini coefficient[1] 0.53 in 1995 to 0.61 in 2003. Twenty percent of the population controlled 65 percent of the total income. Inequality in Zimbabwe reflects the gap between the rural and urban population and also between female-headed households and male-headed ones. Female-headed households earn less than what they constitute whilst male- headed ones earn more than what they constitute. Female-headed households constitute 34 percent of households and yet own only 29 percent of the national income; whilst male- headed households constitute 66 percent of households and own 71 percent of the income, (MPSLSW, 2006).

The structural nature of poverty in Zimbabwe lies in the country's political economy. At independence in 1980, Zimbabwe inherited a dual economy characterized by a relatively well developed modern sector supporting the livelihoods of the minority and a largely poor and neglected rural sector supporting the livelihoods of around 80 percent of the country's population most of whom were women and children. For predominantly economic reasons, to create a working class, the pre-independence colonial regime passed laws that took away land, livestock, and access to irrigation water, young men's labour and any lucrative sources of livelihood from the black majority. This deprivation introduced new and deepened already existing inequalities between men and women.

One major resultant social-cultural change was the dualization of homes. Working men became migrants moving between their urban homes and their rural homes but still controlling decision making in the later. Thus, de-facto female headed households were largely created from this process and this socially re-engineered culture persists to this day. The separation of spouses led to the feminization of rural areas and poverty. In addition to farming on poor soils, women became the sole farmers but without decision making powers to dispose of the produce and to spend money without consulting their absentee husbands. Migrant men, though still generally poor, nevertheless, yielded financial power in relation to poor and disempowered women in the rural areas. (Zimbabwe Human Development Report 2003).

In the meantime the few women who managed to migrate to the urban areas experienced even worse forms of disempowerment and poverty as they naturally became social outcasts in both the rural and urban areas where they were largely viewed as prostitutes. The urban labour market was not sympathetic to the plight of women either. Women found themselves in private domestic employment with low remuneration and poor working conditions. A few dared to venture into vegetable and other minor vending ventures playing a dangerous 'hide and seek' game with the ruthless colonial law enforcement agents. Thus, while the situation has significantly improved since independence, these gender relics of colonialism still haunt the Zimbabwean society.

During the first decade of independence, the then new government sought to address some of these historical imbalances using the following policies and strategies: *Growth with Equity, 1981; Zimbabwe Transitional National Development Plan, 1982-1985; and Zimbabwe first five-year national Development Plan, 1986-1990.* Under these development plans, priority was given to poverty reduction, and government spending was geared towards increased social spending, expansion of rural infrastructure and redressing the social and economic inequalities through land reform. As a result of these efforts, Zimbabwe's social indicators improved impressively during this period. Immunization programs were expanded to cover most children, primary health care services were subsidized, and primary school enrolment became near universal. By 1995, Zimbabwe had registered a net primary education enrolment rate of 82 percent and an adult literacy rate of 86 percent. In 1990, under-five mortality stood at 59.9 per 1 000 live births while maternal mortality was 283 per 100 000 live births.

[1] The Gini coefficient measures income inequalities. The coefficient ranges from zero to one. The higher the ratio the higher the level of inequality.

On economic indicators, in 1990, real GDP growth rate was 7 percent per annum, average annual inflation was 12.4 percent, budget deficit as a percentage of GDP was 5.3 percent per annum, gross national savings as a percentage of GDP was 15.7 percent per annum, gross national investment as a percentage of GDP was 18.2 percent per annum and export growth was 15.2 percent. However, on average during the 1980s decade, the economy grew around 3-4 percent showing signs of stagnation partly due to the inherent structural rigidities, the growth was erratic with several years of severe droughts. As it became clear that the high social spending was becoming unsustainable, the *Economic Structural Adjustment Programme (ESAP)* was adopted in 1991 in an effort to revamp the economy.)

Unfortunately, the ESAP objectives were never realised as the decade of the 1990s generally saw a decline in economic growth, a persistence of high poverty levels, unemployment and inequality. Real GDP growth averaged 1.5 percent per annum during 1991-1995 eroding the welfare gains of the 1980s. Inflation rose to 22.6 percent in 1995. Research into the impact of ESAP showed that women carried the largest share of the costs of adjustment as the state privatised health and education in the midst of rising unemployment and inflation. A class of the 'new poor' emerged under ESAP as the former 'middle class' moved into poverty. Thus, while ESAP did not address the structural inequalities in Zimbabwe, it itself introduced transient poverty.

The 1996 to 2006 decade has been marked by accelerated deterioration in the socio-economic situation. Zimbabwe is experiencing unprecedented economic challenges, with the economy having shrunk cumulatively by about 40 percent since 1999, a four digit year on year hyper inflation of 1 070 percent in October 2006 which has severely eroded the purchasing power of incomes, a severe shortage of foreign currency ,low savings resulting in low investment, high unemployment levels etc. These factors together with the incessant droughts and raging HIV and AIDS pandemic have left the population vulnerable to poverty and food insecurity. During this period the government replaced ESAP with a series of 'home grown' reform packages which include: *the Zimbabwe Programme for Economic and Social Transformation (ZIMPREST) 1996-2000,* launched in April 1998; *the Millennium Economic Recovery Programme,* a short-term 18-month program launched in August 2001; and *the National Economic Revival Programme (NERP): Measures to Address the Current Challenges,* a short-term 12-month program launched in February 2003. Unfortunately, the home grown initiatives, having failed to attract the support of international financial institutions have all not delivered on their noble objectives. The 'fast track' land reform programme which spontaneously started in 2000 had similarly not yet yielded tangible fruit by 2003. Instead in the wake of accompanying severe droughts, agricultural output continuously declined. The cumulative outcome became severe macroeconomic instability.

In 2003, 24 percent of all households owned at least one household business. The percentage owning household businesses has been increasing from 6 percent in 1995.

Zimbabwe's informal sector has been growing over the years from 23 percent in 1995 to 30 percent in 2003. A situation of a big informal sector, although it cushions people from poverty is not desirable, as it indicates failed economic development. It reflects a serious economic growth and employment creation challenge. The shrinking economy pushes people to explore employment opportunities in the informal economy. PASS 2003 showed that the informal sector is a hub of poverty especially for the urban areas in general and particularly for females in the urban area informal sector.

A large proportion of the structurally unemployed people, estimated at over 50 percent of the labour force, were making a living from the generally insecure and poverty stricken informal sector. The majority of these being women trying to make ends meet for their families. Informal sector activities include cross-border trading, vending, beer brewing, mineral panning, petty trading, currency trading, international migration (legal and illegal) to work on menial jobs, prostitution etc. This increased

population mobility worsened the risk of the spread of HIV especially among women and young girls. As experienced under ESAP, women continue to bear the brunt of the economic meltdown effects.

The poverty hardships in Zimbabwe have been compounded and further complicated by the raging HIV and AIDS pandemic. The HIV and AIDS pandemic is undermining food production systems. In 2003 rural households reported having experienced the following impacts: agricultural labour shortages, sale of both agricultural and non-agricultural assets, reduced area planted, agricultural input shortages, increased indebtedness, looking after orphans and withholding children from school as some of the major impacts of the pandemic (MPSLSW, 2006). The HIV and AIDS pandemic gained momentum in the early 1990s, when the country was at its lowest capacity in terms of its ability to respond to the pandemic. Under this scenario the burden of care for the sick has systematically been shifted from the state institutions back to mostly the poor women under the Home Based Care Programmes. Thus poverty, HIV, AIDS and the gender nexus has become the greatest development challenge in Zimbabwe in particular and Southern Africa in general. The 'feminization of poverty' is a systematic feature both in structural and transient poverty in Zimbabwe.

However, there are indications of declining HIV and AIDS prevalence in Zimbabwe. According to the MOHCW, the adult HIV prevalence rate was estimated at 24.6 percent in 2003 and it had declined to 20.1 percent in 2005[2]. However, the recent Demographic and Health Survey (DHS) results gave an adult HIV prevalence rate of 18.1 percent in 2005/6[3]. These results show a decline in HIV prevalence, the first such decline Southern Africa. A total of 1.6million people under 50 years are living with HIV and AIDS in Zimbabwe. These results are indicative of change in sexual behavior including increased condom use with non-regular partners and increased faithfulness. The many interventions by the Zimbabwean government, the international community and local players have yielded positive results. The challenge is to sustain this decline in the face of economic hardships so that the 2015 Millennium Development Goals (MDGs) target of 5 percent HIV prevalence in pregnant women aged 15 to 24 can be achieved.

There is also feminization of HIV and AIDS in Zimbabwe with females having a higher adult HIV prevalence (21.1 percent) than males (14.5 per cent) in 2005/6. HIV prevalence is higher for women than men in all age groups from 15-39 but higher for men than women in ages above 40 years. This indicates the intergenerational sexual patterns between old men and young women putting the girl child at risk of HIV infection. At this rate the 2005 target of 24 percent has been achieved and the 16 percent target by 2015 is likely to be met.

The HIV and AIDS pandemic have increased the demands of the health delivery system. While it has shown great resilience, the public sector health delivery system is severely stressed due to resource constraints. It is affected by staff shortages (nurses and doctors), lack of obstetric equipment, transport for referrals, drug shortages etc thus risking the lives of both mother and baby. Due to the economic hardships households continue to experience serious financial constraints in attending to their health needs. Maternal mortality since the mid 90s continues at an alarming rate. The maternal mortality ratio (MMR) has increased to four digit levels from 695 maternal deaths per 100 000 live births in 1999 to 1 068 in 2002 and 1 237 in 2003 mainly due to the HIV and AIDS pandemic and resource constraints of the health delivery system. With the fall in HIV and AIDS a fall in the MMR is likely but this requires a well resourced health delivery system.

Since independence in 1980 Zimbabwe has registered a great success in expanding the number of both primary and secondary schools. Which include the many satellite schools set up to cater for the recently

[2] This is an estimate from the Antenatal Surveillance.

[3] This is from actual population testing for HIV.

mobile population under land resettlement. Registered secondary and primary schools have increased by 654 and 50 percent respectively between 1980 and 2004. Zimbabwe with an enrolment ratio of 97 percent in 2004 has almost achieved universal primary education. However, the secondary level net enrolment ratio was still low at 50 percent in 2004. There is gender parity at both primary and secondary levels. Despite the quantitative success in enrolments and expansion of schools there are still challenges with regards to quality of education as reflected by high pupil-teacher ratios and pupil-book ratios, low pass rates, low and decreasing completion rates, shortage of classroom furniture, science laboratories and staff housing, lack of safe water and sanitation etc. Dropout rates for girls increase with grade, showing the vulnerability of girls due to pregnancy and other reasons. The transition from form 4 to 5 increased from 9 percent in 2000 to 16 percent in 2003. In 2003 males had a higher transition rate (18 percent) than girls (14 percent). This lower transition rate for girls leads to lower participation of girls in tertiary education and also their disadvantaged position in the labour market. Completion rates at all levels have been declining in recent years.

Financial constraints remain major problems for both levels of education as households find it difficult to cope due to the economic hardships. The education sector is also facing major challenges from the HIV and AIDS pandemic. The HIV prevalence for children aged 15-19 years have HIV is 5 percent in 2005/6. The prevalence for girls (6 percent) is double that of boys (3 percent). The orphanhood prevalence has increased because of the HIV and AIDS pandemic and schools have lost both children and teachers whilst absenteeism of both sick teachers and pupils has also increased.

Zimbabwe is drawing a National Policy on Domestic Water Supply and Sanitation in order to improve the water and sanitation situation which has been worsening over the years. The proportion of rural households with access to safe water has declined from 75 percent in 1999 to 68 percent in 2003 and this is mainly due to inadequate investments and poor maintenance and a decline in donor funding. The 2015 MDG target of provision of universal safe water for all rural households may not be achievable. Hygiene education has also been neglected. Access to safe sanitation in Zimbabwe's rural areas remains relatively low at 42 percent in 1999, 34 in 2002 and 42 percent in 2003. The situation has generally been worsening since 1999. This reflects lack of investment in sanitation programs by all players (government, NGOs, donors and households). The country is far below the safe sanitation target of 73 percent by 2015. Female-headed households are more disadvantaged with regards to access to both safe water and sanitation than male headed ones.

3. REVIEW THE EXPERIENCE IN ZIMBABWE WITH REGARDS TO ESTIMATION OF POVERTY LEVELS

3.1 Poverty Assessment Study Surveys and other sources of poverty data

Zimbabwe has conducted two successive Poverty Assessment Study Surveys (PASS) in 1995 and 2003 to assess thepoverty situation in the country and to inform the Poverty Alleviation Action Plan and the planned Poverty Reduction Strategy Paper respectively. The surveys were conducted by the Ministry of Public Service Labour and Social Welfare (MPSLSW). The 2003 results have recently been published. The specific objectives of the 2003 PASS were to;

- update PASS 2005;
- measure poverty in Zimbabwe in its different dimensions and serve as an input into the National Poverty Reduction Strategy (NPRS);
- provide a relevant database for Human Development Indices and for monitoring the Zimbabwe Millennium Development Goals (ZMDGs); and

- provide an up to date reference point for poverty reduction interventions by Government and many other development players including child welfare agencies, health and nutrition sector, and institutions for gender empowerment, rural and urban local authorities and agencies that advance the causes of vulnerable and disadvantaged groups.(MPLSW, 2006)

The 1995 and 2003 PASS surveys were similar in content. The 2003 PASS was conducted nation wide covering all 10 Provinces and 85 districts (rural and urban). Four types of surveys were conducted namely, the household, homeless people, community and institutional surveys. The household survey which was a cross sectional stratified random sample survey covering 31 725 households is the largest ever household survey conducted in Zimbabwe. The sampling frame was stratified by province, district and four land–use areas namely communal lands, large scale commercial farming areas, small-scale commercial farming and resettlement areas and urban areas. The primary sampling unit was the enumeration area. A two stage design was used with the Enumeration Areas as the primary sampling unit and the household as the second stage sampling units.

The 2003 PASS household survey solicited the following information:

- Characteristics of household members (age, sex, marital status, household head ship, relationship to head of household, orphan hood etc);
- Education (dropouts, reasons etc);
- Health (maternal health, vaccination, nutrition, disability etc);
- Fertility and reproductive health;
- Mortality including maternal;
- HIV and AIDS Awareness;
- Employment;
- Income (employment, household business, agricultural activities, natural resources, transfers);
- Consumption expenditure;
- Food security, adaptation and coping strategies;
- Housing, amenities (water, sanitation and energy) and assets;
- Land and other natural resources (land access and ownership, land conservation and environment, agricultural activities);
- Poverty perceptions;
- Transport and Communication; and
- Time Use.

All the data in the household survey is disaggregated by sex.

The purposive homeless survey collected information from 164 homeless persons covering an equal number of males and females above and below 18 years of age from the major towns. It collected information which was similar to that of the household survey on: demographic characteristics, education, homelessness, employment, health (fertility, infant and child mortality, vaccination, nutrition), and access to assistance.

The Community Survey was in the form of a Focus Group Discussions in rural communities only. It collected information from key informants on various issues #affecting communities such as the characteristics of community members, education, health, HIV and AIDS, agriculture, land and other natural resources, vulnerability, adaptation and coping strategies, poverty perceptions and impact of interventions and community organisation and participation.

The institutional survey was conducted on 1 065 primary schools, 916 secondary schools, 826 health facilities and 978 shops and markets. Information collected from both primary and secondary schools

included school enrolment and staffing levels, school facilities, content of curricula (e.g. life skills modules), beneficiaries of government's education assistance programmes (Basic Education Assistance Module (BEAM) and supplementary feeding programmes.

Health institutions supplied information on health facilities and services, on the staffing levels of health facilities, availability of drugs and vaccines, attendances and admissions, availability of basic emergency obstetric care (EOC) services and equipment, and family planning services. In addition, the health institution questionnaire asked for information on abortions, demand for voluntary counseling and testing (VCT) services, distribution of condoms, and post-abortion care services. For shops and local markets a price survey for selected food and non food items that were available was conducted.

On the other hand the, Central Statistical Office (CSO), the official producer of statistics in Zimbabwe, conducts Income consumption and Expenditure Surveys (ICES) every five years which provides useful data for measuring poverty. The latter survey is used to update the weights used in the formulation of the Consumer Price Index (CPI) and also to assess the income, consumption and poverty levels. Unlike PASS which is cross sectional the ICES runs for a whole year. Besides PASS and the ICESs the other sources of data are population censuses and household surveys and administrative records. Detailed poverty analysis has been conducted for the two PASSs and the 1995/91 ICES. Box 1 gives the list of poverty data sources, periodicity and the responsible institution.

Box 1: Poverty data sources by periodicity and responsible organization, Zimbabwe 2006

- Population Censuses and every 10 years since (1982, 1992, 2002) –CSO;
- Intercensal Demographic Surveys (1987, 1997) -CSO;
- Income Consumption and Expenditure Surveys (1985, 1990/91, 1995/96, 2001) –CSO;
- Indicator Monitoring Survey (1993)-CSO;
- Indicator Monitoring Labour Force Surveys (1987,1994,1999,2004)–CSO;
- Demographic and Health Surveys (1984, 1989, 1999, 2005/06) –CSO;
- Agriculture and Livestock Survey (Annually) –CSO;
- Poverty Assessment Study surveys (1995,2003)– MPSLSW;
- Site Sentinel Surveys –MOPSLSW;
- Zimbabwe Vulnerability Assessment Surveys (Annually since 2002)–Nutrition Commission;
- Nutrition Surveys (Annually) – Ministry of Health and Child Welfare;
- Orphans and Vulnerable Children Surveys (2004/2005)- MPSLSW;
- Maternal and Child Health Survey - Ministry of Health and Child Welfare;
- Anti-Natal Surveillance Surveys (Annually since 1991)- Ministry of Health and Child Welfare;
- National Health Information System (Weekly, monthly, annually) - Ministry of Health and Child Welfare; and
- Education Management Information System (Annually)–Ministry of Education, Sport and Culture.

3.2 Poverty Concepts

The multidimensional nature of poverty complicates its definition and measurement.
In general, poverty can be considered as deprivation, be it a deprivation of income, basic needs or elementary capabilities. PASS 2003 looked at both income and human poverty.

Income Poverty
Income poverty is generally defined as the inability to attain a minimum standard of living measured in terms of income. Income poverty is commonly measured in money-metric terms using poverty lines. Different poverty lines can be identified as follows:

- *Absolute poverty line:* the amount of money required to purchase a bundle of goods to meet basic consumption needs. The poverty lines used in this report are based on this concept.
- *Relative poverty line:* a certain percentage of per capita national income that is considered sufficient for a person to achieve a minimum standard of living. With this poverty line there are always people poor relative to others, i.e. there is always poverty in any society.

The disadvantage of money-metric measures is that they ignore the other dimensions of poverty and this is what human poverty attempts to include

Human Poverty
In 1997 the United Nations developed the concept of human poverty. The main argument being that, poverty is not only about the lack of income to purchase basic needs as assumed by the money metric poverty measures, but should also look at wider aspects of deprivation such as lack of a long and healthy life, knowledge, lack of access to health care, safe water and sanitation, lack of adequate food, freedom of participation, human rights etc .

Human Development
Human development views people not as a means to development but as the ultimate beneficiaries of the development process in which they should participate actively. Human development is defined by the United Nations as a process of enlarging people's choices or empowerment of people. This concept widens the commonly used conventional economic standard of living concept. In addition to economic standard of living it also includes longevity, knowledge, participation, civil and political freedoms etc. The concept of human development has been continuously refined by the United Nations to include issues of sustainability. Sustainable human development means a development process that meets the needs of the present generation without compromising the ability of future generations to meet their own needs. The United Nations Millennium Development Goals framework of 2000 is meant to improve human development.

3.3 Measurement of Poverty

3.3.1 Income Poverty

Derivation of a Food Basket
A food basket can be derived using either the expenditure-based method or the Least- Cost approach.

PASS 2003 used an **expenditure-based method** to calculate a single national food basket as opposed to multiple baskets. The expenditure-based food basket (Lanjouw, www.undp.org) was derived by looking at the expenditure patterns of the poor (bottom 40 percent of households) and the items they consumed. All monthly expenditure was converted to one reference period, November 2003[4] using the CPI. (November 2003 was taken as the base month as most of the survey data collected was for the month of November 2003). The food items from purchases, own production, and transfers to households were then weighted by expenditure shares and quantities. The expenditure from purchases, own production and transfers was taken as reported by households. The first 30 items with the highest weighted expenditure formed the food basket. Some items which fall within the top 30 were left out as they were not clearly

[4] This was designed to minimise expenditure variations caused by hyper inflation.

defined or identified. (Technical Note A) gives the items included in the food basket). The approach adopted for calculation of the food basket recognises the preferences of the poor people.

The Least- Cost approach is another approach which can be used to derive a food basket that meets the minimum caloric energy requirements at lowest cost, based on prevailing prices. To get the FPL the food basket is costed using the prevailing prices.

The advantage of the Least-Cost method is that it does not require detailed household consumption data. However, the approach has limitations in that it does not take people's preferences into account. In reality, people do not necessarily purchase the cheapest calories. Furthermore, the linear programming process used in determining the least- cost basket can become complicated and not transparent to the ordinary person.

Derivation of a Food Poverty Line

After deriving a food basket, average monthly food expenditure per capita and the corresponding number of grams per capita per month consumed were calculated using commodity prices collected during the survey and calculated as weighted prices from quantities and values given by households for purchases, own production, public and private transfers. There was some under-enumeration of prices from shops for commodities like maize meal, sorghum, millet and groundnuts and non collection of prices of beans, fruits and others.

A weighted mean price[5] of each commodity was preferred in the calculation of poverty lines as it was viewed as more accurate in a situation where "informal markets" were largely dominant. The grams per capita were then converted to calorific values per capita per day using Irene Chitsiku's findings on "Zimbabwe Food Items and Nutritional Values" and also the International Nutribase on Health Information for those items not in Chitsiku's paper. The kilocalories used were for raw food items and were not adjusted for cooking as there is no loss of energy due to cooking. The total calories consumed per capita per day from items in the food basket and mean monthly expenditure on them was determined. To get the cost of the nutritionally required 2 100 kilocalories[6], per person per day; the total kilocalories consumed are divided by 2 100 kilocalories and multiplied by the mean monthly expenditure to get the food poverty line. (See Technical Note B for detailed steps in the derivation of the food basket, the FPL and the TCPL).

The Estimation of Non–Food Elements

The Food Poverty Line is necessary, but not sufficient in the determination of a benchmark of basic requirements and poverty classification of an individual/household. A household that can afford to meet food requirements of all members, but lacks the resources to purchase clothing, shelter, education, transport, lighting and heating and health, for example, can be considered deprived in a very basic sense. Therefore, the FPL was scaled-up to determine a TCPL. The TCPL was calculated using the traditional method by finding the average total expenditure[7] per month of households whose monthly food expenditure is equal to the FPL. Other methods that could have been used are the Austere and the

[5] The weighted price is a mean of prices from the different sources, i.e. purchases, own production, public and private transfers, each at its particular price as reported by households.

[6] The Food and Agricultural Organisation (FAO) and the World Health Organisation (WHO) recommend a minimum food energy intake of 2100 kilocalories per person per day for an average active person.

[7] Total expenditure is monthly expenditure on both food and non food items. Technical Note B details how monthly expenditures on non- food items was calculated.

Selected Non-Food Items methods[8]. The rationale for using the Traditional method is that if a household is able to meet all its food requirements, there is high probability that they would be able to meet basic non-food requirements. If a household is not able to meet its food requirements, the probability is that it cannot meet its basic non-food items. However, this is not necessarily the case since as income increases the total food budget share decreases.

PASS 2003 used the traditional method of scaling up because it is likely to include all basic non-food needs of the poor in estimating the TCPL. The traditional method can be argued to commit a higher error of inclusion of non-basic items than of exclusion. It is preferable from a planning point of view to slightly over-estimate than to under-estimate requirements.

Estimation of household expenditure

It is argued in economic theory that expenditures are a better measure of welfare than income as it measures what people have actually expended for consumption and it is also easier to estimate expenditures than incomes. Expenditure per month was collected for each household per each food[9] item. Sources of household expenditure considered were; purchases, own production, public transfers, private transfers and stocks. The household food expenditure for each item was converted to a per-capita measure by dividing it by total number of people in the household. The per-capita expenditures for each item were added up in order to get the total household per-capita food expenditure. The expenditures were adjusted using the consumer price index (CPI)[10] to reflect November 2003 prices. A similar procedure was done for non food items. The total household expenditure was the summation of food expenditure and non-food expenditure. Values were imputed for owner occupied dwellings in both rural and urban areas and also for collected firewood. (See Technical Note C for estimation of expenditures)

Classification of households/persons into poverty categories

Households/persons were classified in terms of income poverty into the following categories:

- Very Poor - Households/persons whose per capita monthly expenditure was below the FPL;
- Poor – Households/persons whose per capita monthly expenditure is equal and or above the FPL but below the TCPL;
- Total Poor (Very poor and poor)– Households/persons whose per capita monthly expenditure was below the TCPL; and
- Non-poor – Households/persons whose per capita monthly expenditure was equal or above the TCPL.

3.3.2 Income poverty indicators

The Foster-Greer –Thorbecke (FGT) income poverty measurements: the poverty incidence, gap and severity were calculated. Poverty incidence is the proportion of households below a defined poverty line. The poverty gap or depth measures the gap between expenditures of the poor and the TCPL. It is often expressed as a Poverty Gap Index. The poverty gap therefore gives an indication of how much would be

[8] In calculating the Austere poverty line, the average non-food expenditure of people whose total expenditure is equal to the Food Poverty Line is determined. This average is then added to the FPL. For the Selected Non-Food Items method, specify items that could be considered basic non-food items such as education, health, transport, clothing, fuel and housing for the poor. Find mean expenditure of basic non-food items. Add this mean to the FPL to get a TCPL.

[9] PASS 2003 collected expenditure on 49 food items.

[10] The Consumer Price Index used was obtained from CSO. The food expenditure was adjusted using the food CPI.

required to bring that poor person/household to the TCPL. Poverty severity basically measures how poor the poorest of the poor are. It is also often expressed as the Poverty Severity Index and helps policy-makers on how to redistribute resources among the poor to reduce inequality. (See Technical Note D on FGT measures).

A Gini coefficient was also calculated to measure income inequalities. The population and income shares were also compared for female and male headed households and across poverty categories.

3.3.3 Poverty comparisons between 1995 and 2003

For the 2003 PASS Main report, PASS 1995 poverty prevalences were recalculated using the 2003 methodology in order to compare the two findings. . PASS 1995 had used the Least Cost Approach and also incomes instead of expenditures in determining the poverty categories. The PASS 2003 methodology is more technically advanced and in line with international best practices, than PASS 1995. For gender analysis there is no comparison with 1995 being done.

3.3.4 Human Poverty and Human Development

The HPI and HDI are composite indices that were developed in the early 1990s to complement the money-metric measures of poverty and development, as an alternative to the dominance of GDP per capita as the main measure.

The HPI includes three dimensions of deprivation: health as measured by the probability at birth of not surviving to age 40; knowledge as measured by the adult illiteracy rate; and a decent standard of living as measured by the percentage of children under five who are malnourished (underweight), the percentage of population without access to safe water, and the percentage of population without access to health care

The HDI is a summary measure of human development. It measures the average achievements in a country in three basic dimensions of human development: a long and healthy life as measured by life expectancy at birth; knowledge as measured by adult literacy and average years of schooling; and decent standard of living as measured by mean income per capita.

3.3.5 Outputs from PASS 2003

A number of publications are being produced from the PASS 2003 namely; The Main Report (with 22 chapters covering the various economic and social dimensions of poverty and comparing 1995 and 2003), 10 Provincial Reports, a Poverty Atlas and four thematic reports on The Gender Dimensions of Poverty , Poverty and Orphans and Vulnerable Children, Poverty and Nutrition and Poverty and the Environment. The thematic reports are the first to be produced from a PASS. Various United Nations (UN) Agencies have supported the production of thematic reports which are relevant to their mandate. All these reports from the PASS 2003 process are gender mainstreamed. However, in addition to the gender mainstreaming in the various reports, the Gender Dimensions of Poverty Report will mainstream gender in greater detail than the other reports.

In addition to the production of the various reports the large volumes of raw data from PASS 2003 will be made readily available to the public for further in-depth research.

4. REVIEW THE EXPERIENCE IN ZIMBABWE WITH REGARDS TO GENDER STATISTICS DEVELOPMENT

The government of Zimbabwe, is a signatory to various regional and international conventions, protocols and declarations on gender. Amongst these are:

- Convention on the Elimination of All Forms of Discrimination Against Women (CEDAW);
- Universal Declaration of Human Rights;
- Convention on Civil and Political Rights;
- Convention on Economic, Social and Cultural Rights;
- Convention on the Minimum Age for marriage and Registration of Marriages;
- Beijing Declaration and Platform for Action of 1995;
- Millennium Declaration, 2000;
- Southern African Development Community (SADC)'s Declaration on Gender and Development and its addendum on the Prevention and Eradication of violence Against Women and Children; and
- The African Union (AU) Protocol on Women's Rights to protect women and girls against gender violence especially during armed conflict; etc

In 2004 Zimbabwe formulated a National Gender Policy 2004. Some of its critical goals include: eliminating all negative economic, social, legal and political policies, cultural and religious practices that impede equality and equity of the sexes; mainstreaming gender in all aspects of the development process and to ensure sustainable equity, equality and empowerment of women and men in Zimbabwe, in all aspects of life. A National Plan of Action has since been put in place to guide the implementation of the National Gender Policy. Zimbabwe established a national gender machinery in the form of the Ministry of Women Affairs, Gender and Community Development in 2005 together with gender focal points in all key ministries. Several gender desks are present in both the public and private sectors in Zimbabwe which act as 'focal points' for gender mainstreaming and addressing gender equity concerns. Plans are under way to establish a Commission on Gender Equality in Zimbabwe adopting lessons learnt from South Africa.

The challenge encountered so far is that the national machinery is not adequately resourced (financial and human) to effectively implement the gender mainstreaming strategy. Most of the gender focal points (GFPs) are for some reason human resources managers who unfortunately have no link with development policy formulation and implementation. At best such focal points can influence gender equity in the recruitment policy. Some institutions pay lip service to the gender challenge by appointing very junior officers with no decision making powers to be GFPs. In addition, most GFPs have no clue of what the gender challenge is about and hence what it is they are being tasked to do, so that a lot of capacity building is needed. Another noticeable trend is that GFPs are mostly women which further marginalizes the gender agenda.

Zimbabwe has put in place several other measures to address gender inequalities. One such measure is the use of Affirmative Action in several sectors. For example, the 1989 Presidential Directive for the Public Service was one of the first attempts to address gender inequalities in Zimbabwe. This positive discrimination in favour of women made it possible for a few women to be appointed as ambassadors and senior officers in the public service. While affirmative action has been used to bring about some degree of progress in addressing gender inequalities in accessing higher education and employment, a mammoth challenge still exists in these two areas. It is also worrying to note that the private sector operations remain largely outside these measures.

The government has also tried to address gender issues using legislation such as those shown in Box 2. The Domestic Violence Bill (2001) which has passed the lower house is the latest in addressing gender violence issues.

Box 2: Zimbabwe examples of major legislation to outlaw gender discrimination since independence in 1980	
Examples of major legislation between 1980-1991 include the following;	
General Laws Amendment Act Chapter 8:07	which incorporates the *Legal Age of Majority Act 1982* and equal opportunities legislation;
Matrimonial Causes Act Chapter 5:13 1985	which sets out grounds for divorce and flexible provisions regarding factors to be taken into account in distributing property upon divorce;
Customary Law and Local Courts Act, 1981	Which provided for maintenance claims for women in unregistered marriages and also empowered community courts to administer maintenance laws;
Concealment of Birth Act Chapter 9:04	which imposes penalties for concealment of birth; and
Deceased Persons Family Maintenance Act Chapter6:03, 1987	which protects estate from property grabbers and allows spouse and family, house and household goods and implements pending winding up of estate
Labour and income legislation	
Minimum Wages regulations of 1980	which set out minimum wages for various unskilled occupations. Seasonal workers such as tobacco, tea and cotton pickers were classified as 'permanent workers' for the purposes of pension benefits;
Equal Pay Regulations 1980	which provides for equal pay for equal work and half an hour's time before and after lunch time for breast feeding.
The *Labour Relations Act Chapter 28:01 1984*	dealing with non-discrimination in employment and maternity provisions and
Public Service Pensions Regulations 1985	which allowed women to contribute to medical aid schemes in their own right and to the Pension Scheme at the same rate as men
The *Tax Regulations of 1988*	which allowed for separate taxation of married persons came on board
Legislation after ratifying CEDAW in 1991	
The *Infanticide Act 1991 Chapter 9:12*	which takes into account the special mental and social circumstances of women who commit infanticide;
Deeds Registry Amendment Act 1991 Chapter 20:05	which added gender to the non-discriminatory clause of the constitution;
Constitution Amendment No. 14 1996	where physiological differences are to be taken into account as non-discriminatory;
Administration of Estates Amendment Act, 1997 Chapter 6:07	to resolve the demise of single heir concept and put emphasis on surviving spouse and all children in relation to customary law of inheritance;
Sexual Offences Act No.8 of 2001 Chapter 9:21	which has several objectives including combating

	prostitution, punishing for deliberate transmission of HIV and AIDS, protecting young persons and mentally retarded persons from sexual exploitation and
The Domestic Violence Bill of 2000	To preserve and protect harmony by providing legal channels for dealing with the problem of domestic violence (Has just passed the lower house)
Source: *'Children and Women's Rights in Zimbabwe: Theory and Practice'*; UNICEF, September 2004. *'Beyond Inequalities: Women in Zimbabwe';* Zimbabwe Women Resource Centre and Network (ZWRCN) and Southern Africa Research and Documentation Centre (SARDC), Harare, 1998.	

Some of the gender issues in Zimbabwe which were listed in the discussion paper in preparation of the national gender policy were as listed in Box 3, (Central Statistical Office, 1997).

Box 3: Some of the Gender Issues in Zimbabwe

1. Customary laws, practices and beliefs especially those related to inheritance, continue to abrogate women's rights as well as exposing them to all forms of discrimination;
2. Women and men not equally represented in judiciary and quasi-judiciary structures including traditional and customary courts;
3. Although women constitute the majority of labour force in agriculture , they own very little commercial land , and most of them have secondary rights to communal land;
4. Women dominate the marginalized low income earning informal sector which is not linked to mainstream macro and micro economic policies and programmes;
5. The current national economy accounting system do not recognize women's contribution to GDP and GNP, thereby continue to marginalize women's contribution to the economy through their unpaid domestic labour and community support;
6. Women are very little represented in the formal sector employment;
7. Women have limited participation in decision making structures in all sectors and at all levels of the society.
8. Imbalance in enrolment of girls and boys at secondary and tertiary levels. Female enrolments in science/mathematics and technical fields are small, while they dominate in fields leading to traditional female occupations;
9. Female drop out rate is higher than that of males especially in higher grades;
10. The boy child receives preferential treatment in education, due to important role played by cultural and religious factors;
11. Health delivery and services not accessible to all;
12. Some of the socio-economic , cultural, religious, legal, political and customary issues and practices impact negatively on health including HIV and AIDS and mental diseases;
13. Maternal mortality increasing at alarming rate-now four digit;
14. There are gross gender imbalance in the distribution of, ownership of and access to resources in agriculture
15. Women have limited access to financial resources and markets for their agricultural produce;
16. Fewer women access land through the various land resettlement schemes;
17. There is lack of information on issues that would promote the full participation of women in power structures which can enhance their advancement at all levels;
18. Most of the information developed in Zimbabwe is still heavily biased against women;
19. Women spend most of their time doing reproductive work, and this results in time poverty as they cannot engage in remunerating activity.

The formulation, implementation, monitoring and evaluation of policies that seek to promote gender equality and equity, require up to date and reliable statistical information. The Central Statistical Office (CSO) is the official producer of statistics in Zimbabwe. Gender statistics has been institutionalised by the CSO by the creation of a Gender Statistics section manned by a full time statistician. Gender statistics are obtained from routine censuses and surveys and also from administrative records. The CSO produces mainly descriptive quantitative data, which has to be complemented by qualitative research from the academic and research institutions. Qualitative data are more likely to provide helpful explanations and insights on socio-cultural attitudes and trends which could be useful in finding possible ways to initiate changes in them.

Zimbabwe has successfully carried out Population Censuses and Intercensal Demographic Surveys every 10 years since 1982 and there are also some routine surveys conducted by the CSO which provide gender statistics. Since gender is a cross cutting issue the same sources which provide poverty data also provide gender statistics as shown in Box 1.In all surveys, censuses and administrative records data is collected by sex. In its 2005 to 2009 Plan of Action the CSO intends to do more internal sensitization of its staff on gender mainstreaming, publish two gender fact sheets and a booklet on women and men in Zimbabwe, do a gender inquiry and a user/producer workshop on gender statistics, create a gender statistics database in 2008 and also to conduct the first Time Use Survey in Zimbabwe.

The CSO has conducted two gender statistics user enquiries in 1992 and 2004. The gender statistics user enquiry is a postal survey targeted at government ministries and departments, private sector, non-governmental organizations, parastatals, university departments and UN agencies. The purpose of a user inquiry is to identify user concerns, determine sources and availability of existing gender statistics and also to identify data gaps relevant to gender activities and progress. The gender statistics enquiry of 2004, for example, covered such areas as priority gender activity, awareness of policies, declarations, conventions, scope and coverage of the CSO gender publications, use of gender statistics, availability and accessibility of gender statistics etc. The findings from these user inquiries were used to assess the effectiveness/relevance of previous publications on Women and Men and also to prepare for forthcoming publications. The 2004 gender enquiry, for example, concluded that users of gender statistics require more up to date data and comprehensive statistics on gender and also that there should be consistency in the periodicity of publishing the "Women and Men" publication in Zimbabwe.

In addition to the specific gender statistics user enquiry the CSO also periodically conducts general statistics user producer workshops. The 2004 workshop was the fourth such workshop whose objectives were to promote dialogue between users and producers of statistics; review and appraise current delivery of statistical systems; assess relevance of available statistics to the current socio-economic environment; educate users and producers of statistics on how certain statistics are produced, and used and on definitions and concepts; identify priority areas of statistical delivery systems; recommend strategies for efficient delivery of statistical information; and come up with a Plan of Action. A sector specific agricultural gender statistics workshop such as the Gender Disaggregated Agricultural Statistical data User/Producer workshop, was conducted in 1997.

The CSO conducts internal assessments on gender statistics available within the CSO. Two such assessments have been conducted in 1997 and 2004. The purpose of the internal assessment is to assess achievements in the compilation of gender statistics, find out the constraints and suggest ways of mainstreaming gender etc. Internal sensitization of CSO staff in gender mainstreaming is also carried out.

UNICEF has done a legal review of local legislation called Children and Women's Rights in Zimbabwe in 2004 (UNICEF, 2004). Such exercises provide information on the status of legislation vis-à-vis improving the situation of women.

Despite the impressive volumes of data collected on gender in Zimbabwe, gaps still exist in crucial information on the empowerment of women such as: domestic violence and abuse; access to resources including land, credit and inputs; informal sector opportunities; occupational segregation, remuneration, employer preferences and training; time use etc. Data gaps are a result of three possibilities such as a) data is currently not being collected, b) data is being collected but not being analysed and c) critical indices are not produced.

The major challenges that remain especially for CSO has to do with filling these gender data gaps. There is need for resources and capacity to process the huge volumes of gender information in the various data sets at the CSO and also capacity to do in-depth gender analysis. The high staff turnover at the CSO mainly resulting from unattractive remuneration and other conditions of service renders the training of gender statisticians a futile exercise. Presentation of gender statistics in a user friendly way also remains another challenge together with the problem of timeliness of results. A lot of the data collected through the NHIS and EMIS also needs to be optimally analysed by gender.

5. CRITIQUE ON HOW WELL THE GENDER DIMENSION HAS BEEN (IS BEING) TAKEN INTO ACCOUNT IN PASS 2003

The thematic report on the Gender Dimensions of Poverty: 2003 Poverty Assessment Study Survey (PASS) which is being compiled by the MPSLSW and UNIFEM will be one of the first comprehensive publications on poverty and gender in Zimbabwe. It will draw from both the WID and the GAD approaches which were discussed earlier. This status report draws attention to both approaches so that the specific needs of women can be identified as well as the inequalities between women and men as determined by their relationships.

The Gender Thematic Poverty report will be a status report which is designed to measure poverty and its gender dimensions. The report will present the poverty situation of women and men in Zimbabwe. This report should go a long way in providing information on the gender dimensions of poverty, in all areas such as poverty prevalence; human poverty and human development; demographic characteristics; education; general health and disability; HIV, AIDS and chronic illnesses; Orphans and Vulnerable Children (OVCs); activity and the labour force; the informal economy and household businesses; agriculture; the environment; income, consumption and expenditure; child nutrition and household meal consumption; agriculture; environment; housing amenities; ownership and access to assets; access to transport; communication and other services and time use. This Gender Thematic Report presents the first integrated story of poverty, gender and the different socio economic issues and brings out the interconnectedness of these issues. This is the first such attempt in Zimbabwe, as there have previously only been partial stories from disjointed initiatives. The big sample size enables a more detailed analysis to be carried out, than the small surveys.

The Gender Thematic Report is designed to add value to the limited poverty and gender analysis presented in the 2003 PASS Main Report. In the later gender analysis was done on the basis of two household categories namely: female headed households (de-facto combined with de-jure) versus male headed households. The structure and dynamics of households and intra and extra-household capabilities are diverse and complex. The classification of households into female-headed and male headed distracts attention away from the circumstances of the majority of women in rural areas who live in a household in which a male is the de-jure head. In the 2003 PASS Main Report, gender was analysed at national level and in a few cases at provincial level only, thus gender by rural-urban was not done yet these two have different characteristics sometimes calling for different interventions. Most of the main report gender analysis is not linked explicitly to the poverty dimension.

Analysis in the Gender Thematic Report therefore looked at three household categories namely:

- De-facto female headed household (presently heading while spouse is away)
- De-jure female headed household (legally the head e.g. widow, single women, divorced) and
- Male-headed household, for comparison.

However, it can also be argued that even the de-facto female heads differ depending on what their spouses are doing. Those de-facto female heads with spouses working elsewhere are less vulnerable to poverty than those with spouses whose whereabouts are not known, for example. For the de-jure female heads there are also differences between the different types such widows, divorcees, separated married, single and those co-habiting. For PASS 2003, it is possible to further disaggregate the de-facto and de-jure by these sub groups. Child-headed households would be another type of household especially with HIV and AIDS and the increase in Orphans and Vulnerable children but from the 2003 PASS this was not statistically significant for analysis by poverty groups.

Even though most gender analysis uses the different gender headship types, there are problems associated with the concept of the household and using it as the unit of analysis in poverty measurement. Quantitative and qualitative research has shown that the experience of poverty is differentiated within the household. Income, power and assets have been found to be unequally distributed within the household, suggesting that poverty may occur in a household in a differential manner. Access to assets such as land or livestock also may influence power relations in a household.

The analysis to be provided in the Gender Thematic Report is mainly descriptive with only inferred causality. The methodology of the survey does not allow for an analysis of causal factors. The recommendations and at times strategies presented in the report are therefore based on speculation and general knowledge, without clear causal evidence. Ideally, a comprehensive survey should look at both the status and the causes because this is what policy makers require. However, status reports are still important tools for monitoring development progress, the impact of policies and programmes and for policy reviews and design of new policies. Because of the lack of the causality which is critically required; if policies and strategies are to effectively diffuse the current gender paralysis in development reports, there is a need to adopt research methodology which is designed to bring out the 'whys' in the gender development challenges. Such a methodology can be evidenced in the planned Zimbabwe Human Development Report 2006/2007 which is on gender.

Gender mainstreaming has to be considered seriously at the beginning of a study such as the PASS. For the 2003 PASS process a gender expert was recruited at the tabulation stage, after the data had already been collected. This is not the most suitable method as, at that stage it is too late to incorporate any useful additional gender aspects into the instruments. Gender aspects should be thought of before questionnaire design rather than post survey. Some of the survey methodolog such as the community survey and focus group discussions have few gender dimensions which can be analysed.

Figures 1 and 2 present some of the findings on poverty prevalences by gender of head of household and also by marital status of the de-jure female headed households respectively. Some of the findings of 2003 where contrary to expectation de-facto female headed households had the highest poverty prevalences. This is because of their lack of coping strategies in periods of economic hardships when remittances from spouses elsewhere had dwindled. Among the de-jure female headed households, households headed by widowed female heads are the most vulnerable as shown in Figure 2.

Figure 1: Poverty Incidence by Gender of Household Head, Zimbabwe 2003

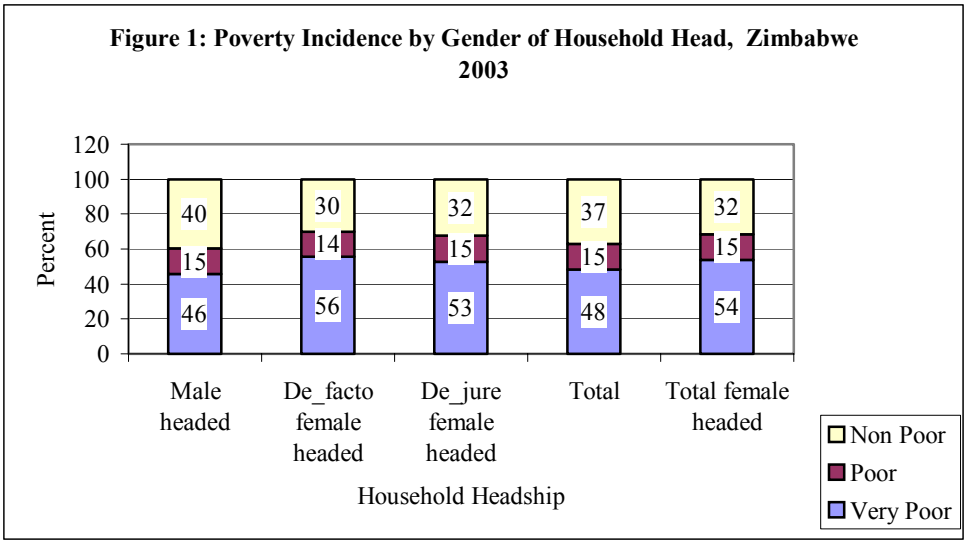
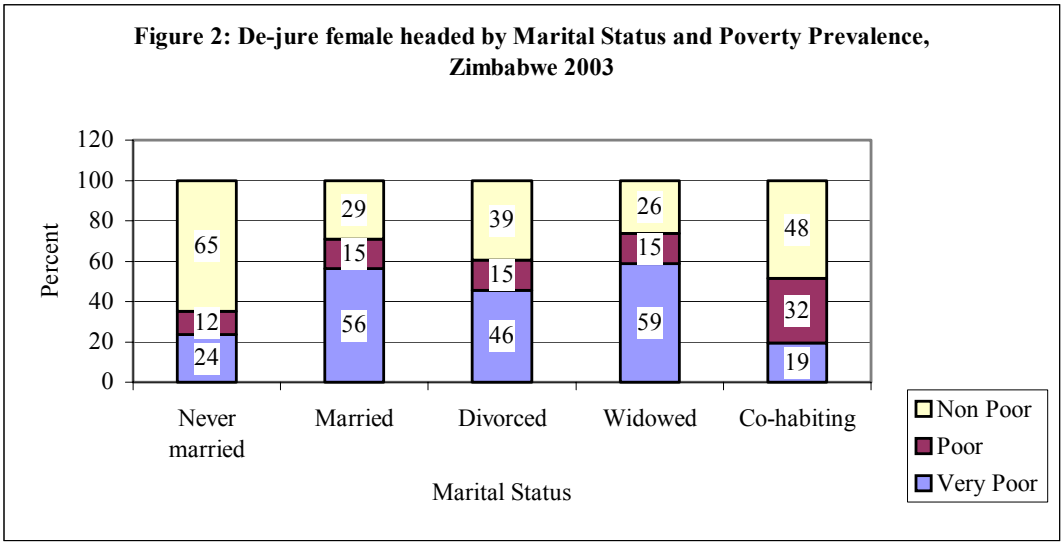


Figure 2: De-jure female headed by Marital Status and Poverty Prevalence, Zimbabwe 2003



These results, for example, reflect the improved empowerment of women in terms of making decisions on use of household income compared to two or so decades ago. Seventy one (71) percent each of the females and males who were earning wages and salaries made individual and joint decisions on the use of primary income. Since empowerment involves either individual or joint decision making, these findings reveal that there is equal empowerment for males and females in decision making regarding the use of primary income. However, a greater proportion of women made individual decisions. Before these findings it was generally speculated that men dominate and make individual decisions on incomes. Even for married people the results still show that the situation has improved over time.

The 2003 Gender Thematic Report is also looking at time use. PASSs are the only sources of time use data in Zimbabwe. Time use data was collected for heads of households and their spouses. This analysis will give insights into issues of unpaid care work, health, reproductive roles, productive roles, leisure, education and traveling etc which have crucial implications in gender inequalities. However, the

concentration on heads of households and their spouses leaves out the activities of other women and men in households and therefore may not give a full picture. Younger members of the household are also engaged in different activities in the homes which need to be considered if a comprehensive gender time allocation analysis is to be made. PASS 2003 was a cross sectional study conducted during the summer season and therefore may be at variance with conventional beliefs as it only relates to the summer season. This is particularly so for rural people, due to the seasonality of labour demand.

Issues of time poverty are also arising. Women participate more in reproductive roles and less in productive roles than men. This results in women having higher income poverty and at the same time having less time for leisure and other social activities. The very poor in both rural and urban areas tended to sleep and rest more as they did not have sufficient opportunities to engage in productive activities. This is a negative trend because it is not voluntary, but instead reflects underemployment. Even with regards to simple activities like bathing, greater proportions of men bath and rest than women. Thereby reflecting the issue of too much time being spent on the reproductive role of women.

The MDG process has to a large extent used the gender disaggregated data from the 2003 PASS to mainstream gender. The Zimbabwe Human Development Report 2006/07 on gender is another initiative which is going to use the findings of the 2003 PASS extensively and of the Gender Thematic Report in particular.

6. THE CHALLENGES

There is need for policy makers and other actors to appreciate gender issues and the negative impact of gender inequalities on the development of any economy. Gender mainstreaming is required in policy formulation in two ways. First, there should be gender mainstreaming at the onset of formulating a policy. Secondly gender mainstreaming can be conducted at the point of reviewing a policy, for those policies which would have been formulated without adequate mainstreaming. One of the biggest challenges is to make policy makers appreciate gender disaggregated data and use it widely to inform policy making and programming. Currently, there appears to be no capacity in policy makers to effectively utilize gender data in mainstreaming. Admittedly large amounts of data which is disaggregated by sex exists, however its detailed use in order to inform policy making and programming is limited.

The main actors who should be taken aboard for gender mainstreaming are Government Ministries and Departments, civil society, private sector, the United Nations and other bilateral and multilateral organizations. The results from the poverty and gender analysis should be disseminated to all these actors in a way which is easy to understand and which encourage them to use this data in their plans.

Some of the main actors in the mainstreaming of gender from government should be; Ministry of Finance, Ministry of Economic Development, Reserve Bank of Zimbabwe, Ministry of Youth Development, Gender and Employment Creation; CSO; Ministry of Agriculture, MPSLSW; Ministry of Education, Sport and Culture; Ministry of Higher and Tertiary Education; Ministry of Health and Child Welfare; Ministry of Lands and Resettlement; Ministry of Local Government; Ministry of Legal and Parliamentary Affairs; President's Office: Monitoring and Implementation Division; Ministry of Transport and Communication; Ministry of Information etc and all the other line ministries.

Non –governmental Organisations which advance gender issues are also important actors in gender mainstreaming. Examples of these are the National Association of Non Governmental Organisation (NANGO); Zimbabwe Women Resource Centre Network (ZWRCN); Women Action Group (WAG); Padare; Musasa Project; Women in Law and Development in Africa (WILDAF); Women in Law in

Southern Africa (WILSA); Zimbabwe Council of Churches; Zimbabwe Red Cross Society; Girl Child Network; Silveira House; Zimbabwe Congress of Trade Unions (ZCTU), Employers Confederation of Zimbabwe (EMCOZ), Confederation of Zimbabwe Industries (CZI), etc

Main actors from academic and research institutions would include various departments which deal with research on development issues such as; Institute of Development Studies-University of Zimbabwe; Population Centre for Development Studies; Department of Statistics; Sociology Departments; and Agriculture Department etc.

There is need to produce timely gender statistics .Most of the data series in Zimbabwe are out of date and are at least three years behind. Outdated data complicates the process of current policy making and programming. To date detailed analysis on poverty and gender is being done on 2003 data. Things may have drastically changed since 2003 and policies being made today should be informed by current data.

There is need to do further research on topical issues of concern. Crucial information which is required for making informed policies on gender issues such as time use and unpaid care work, general and domestic gender violence, access to resources, informal economy opportunities, HIV and AIDS etc. AS mentioned earlier, the issue of time poverty has become topical in gender discourse since women are burdened with reproductive roles and are not available for remunerative activities. With the HIV and AIDS pandemic this has been worsened by the need for women to participate in home-based care. It is therefore very useful to have detailed information on how women and men spend their time so as to come up with strategies to lessen the burdens especially for women. Domestic violence is on the increase in Zimbabwe and there is need to produce information on the extent and type of abuse so that policies to curb it can be put in place.

There are also issues of concepts and definitions which need to be improved to make them relevant for gender analysis. Concepts such as household and household headship, marriage, economic activity, informal sector etc.

7. THE WAY FORWARD

There is need for the identification of crucial gender issues in Zimbabwe, followed by the adoption of a list of core statistics and indicators needed to address those issues. Key players such as the CSO and all key policy making institutions such as the Ministries of Women Affairs, Gender and Community Development, Finance, Economic Development and the Reserve Bank of Zimbabwe and also the Gender Focal Points in line with the ministries need to be trained in gender concepts, measurement and indicators. After that users and producers of gender statistics under the guidance of experts in gender statistics and mainstreaming will come up with a list of core statistics and indicators needed to address the crucial gender issues.

Coming up with the indicators and producing them is a necessary but not sufficient condition for effective gender mainstreaming. The lack of adequate capacity in gender mainstreaming in planners and policy makers calls for the compilation of standard guidelines on gender mainstreaming. The guidelines should clearly illustrate the processes to be followed in gender mainstreaming. Besides the guidelines, key gender mainstreamers should also be trained. This can be done through workshops and also technical assistance in gender mainstreaming during the policy formulation process. Since the staff turnover in these key institutions is high, it will be necessary to build a core network of gender experts who can be called upon to assist in gender mainstreaming in every national plan formulation process.

Zimbabwe has large amounts of quantitative data collected which is disaggregated by sex. The challenge is to optimally tabulate and to conduct in-depth analysis using that data and to use that data to mainstream gender in development plans and programs. There is need to conduct complementary quantitative research to answer most of the "whys" from the Gender Thematic Report. Doing further research on topical issues of concern on poverty and gender such as time use and as unpaid care work, on the informal sector etc.

There is need for resource mobilization from government, partners and other donors to do the following:

- Technical and financial support and capacity building to the whole gender mainstreaming machinery – Ministry of Women Affairs, Gender and Community Development, The Gender Focal Points in line ministries etc;
- Capacity building of the CSO to enable it to produce relevant and timely gender statistics and also to do in-depth gender analysis to be used for planning , monitoring and evaluation;
- Capacity building in gender mainstreaming in plans to planners especially those in key government institutions such as the Ministry of Finance, Ministry of Economic Development, Ministry of Agriculture, Reserve Bank and other line ministries;
- Technical and financial support and capacity building in the conduction of special surveys on gender to fill the data gaps such as the planned Time Use survey by the CSO in 2009 and also possible surveys such as on the informal sector, on access to resources, occupational surveys etc and also to update PASS 2003 in order to produce another Gender Thematic Report ;
- Build a core network of gender experts who can be called upon to assist in gender mainstreaming in every national plan formulation process and to give financial and technical support to local consultants to produce gender reports on various issues;
- Support combined analysis to produce in-depth gender reports from all scattered gender data from various data sets which remains untabulated and unanalysed such as the 2001 Income Consumption and Expenditure data, Education, Employment and also data from the Social Services Department etc;
- Strengthening capacity in qualitative research and in-depth analytical gender analysis and presentation through universities and other research institutions. Target specific areas priority areas such as The National Plan of Action for Women and Girls to reduce vulnerability to HIV and AIDS, The national Action Plan for Orphans and Vulnerable Children etc; and
- Support to improve the presentation and dissemination of gender statistics to law and policy makers, Non Governmental Organisation and the private sectors and other stakeholders in user friendly and briefing kits, brochures etc.

8. CONCLUSION

The poverty, HIV, AIDS and gender nexus has become the greatest development challenge in Zimbabwe in particular and Southern Africa in general. Zimbabwe continues to suffer from both structural and transient poverty whose causes and outcomes are engendered. Whilst a lot of gender disaggregated data is available, using it to inform policy and programming remains a major challenge. The importance and usefulness of the Gender Thematic report cannot be overemphasized. It will remain one of the most informative reference documents for gender mainstreaming in the formulation of socio-economic policies and programs for years to come. However, effort should be made in doing in–depth analysis which brings out the causes of poverty which are essential in policy formulation and programming for poverty reduction. Furthermore there is a need to close the gender information gaps.

9. BIBLIOGRAPHY

i. Central Statistical Office 1997, Report of the Mission on Gender Statistics ,14 July to 8 August, 1997 by Wariara Mbugua, Adviser, Gender Population and Development and Jacob Tayo, Advisor, Population Statistics and UNFPA/CST Harare, Central Statistical Office, Harare, 1997.

ii. Ministry of Public Service Labour and Social Welfare 1997, 1995 Poverty Assessment Study Survey: Main Report.

iii. Ministry of Public Service Labour and Social Welfare 2006, 2003 Poverty Assessment Study Survey: Draft Main Report.

iv. Institute of Development Studies, University of Zimbabwe, Poverty Forum of Zimbabwe, 2003, Zimbabwe Human Development Report 2003: Redirecting our responses to HIV and AIDS: "Towards reducing vulnerability-the ultimate war for survival.", Harare, 2003.

v. Government of Zimbabwe 2004, National Gender Policy, Government of Zimbabwe, Harare 2004.

vi. Government of Zimbabwe 2004, Zimbabwe Millennium Development Goals, 2004 Progress Report, Government of Zimbabwe, Harare 2004;

vii. UNICEF, September 2004, Children and Women's Rights in Zimbabwe: Theory and Practice'; 'Beyond Inequalities: Women in Zimbabwe'; Zimbabwe Women Resource Centre and Network (ZWRCN) and Southern Africa Research and Documentation Centre (SARDC), Harare, 2004.

viii. Government of Zimbabwe, Zimbabwe Millennium Development Goals, 2004 Draft Progress Report, Government of Zimbabwe, Harare 2004

ix. Central Statistical Office, 1998, Report on the Proceedings of the User Producer Statistics Symposium, Kadoma Ranch Motel and Conference Centre, 27-31 July 1998, Central Statistical Office, Harare, 1998;

x. Central Statistical Office 2005, Report on the Proceedings of the User Producer Statistics Symposium, Kadoma Ranch Motel and Conference Centre, 8-12 November 2004, Central Statistical Office, Harare, 2005;

xi. Central Statistical Office, 2002, Women and Men in Zimbabwe, Central Statistical Office, Harare, 2002;

xii. Central Statistical Office, 2004, Gender Statistics Available Within the Central Statistical Office, Central Statistical Office, Harare, 2004;

xiii. Central Statistical Office, 2005, Gender Statistics Available Within the Central Statistical Office, Harare, Central Statistical Office, Harare 2005; and

xiv. Central Statistical Office, Gender Statistics User Inquiry Report, Central Statistical Office, Harare, 2005.

TECHNICAL NOTE A

The list of food items by mean expenditure, number of households consuming, percent of households consuming, weighted mean, kilocalories per 100 grams and by whether or not they are in the food basket, Zimbabwe 2003 (MPLSW, 2006)

Item	Mean expenditure	Number of households Consuming	Percentage of households consuming	Weighted mean	Kcal/100g	Food Basket (1=yes, 2=no)
Beans	195.56	890	7.0	1,370.22	175.90	1
Bread	198.73	1,396	11.0	2,184.13	267.00	1
Butter_Margarine	107.26	1,000	7.9	844.45	718.00	1
Cabbages	149.69	2,937	23.1	3,461.24	25.00	1
Coffee_Tea	86.00	2,769	21.8	1874.70	1.50	1
Cooking oil	2,414.71	9,083	71.5	172,672.19	895.00	1

Dried_Vegtables	243.79	2,578	20.3	4,948.03	319.40	1
Eggs	76.12	908	7.1	544.13	156.70	1
Fish_matemba	205.47	1,887	14.9	3,052.43	223.25	1
Flour	258.47	1,188	9.4	2,417.40	355.70	1
Fruits	123.55	1,660	13.1	1,614.63	63.42	1
Green_mealies	3.51	74	0.6	2.05	102.30	1
Groundnuts	52.59	422	3.3	174.70	591.00	1
Maize_meal_grain	4,677.41	11,821	93.1	435,298.87	356.30	1
Meat	789.08	4,348	34.2	27,010.84	223.72	1
Milk	320.96	3,186	25.1	8,050.65	237.73	1
Millet	62.68	360	2.8	177.65	349.00	1
Non_alcoholic_bev	31.62	340	2.7	84.65	143.33	1
Onions	131.39	3,054	24.0	3,158.99	40.60	1
Peas	38.08	219	1.7	65.65	340.60	1
Potatoes	44.86	390	3.1	137.73	80.80	1
Pumpkins	15.28	193	1.5	23.22	28.80	1
Rape_Covo_Chomoulier	1,006.07	7,672	60.4	60,766.80	48.00	1
Rapoko	39.01	231	1.8	70.94	332.00	1
Rice	160.08	1,000	7.9	1,260.26	357.40	1
Salt	68.63	12,702	100.0	6,863.36	0.00	1
Sorghum	73.15	473	3.7	272.41	348.00	1
Sugar	1,074.91	7771	61.2	65,762.32	387.90	1
Sweet_potatoes	35.45	286	2.3	79.83	112.50	1
Tomatoes	404.43	5,792	45.6	18,441.72	20.50	1
Alcoholic_bev	97.84	700	5.5	539.19	110.67	2
BeansPorridgeCornsoyabl end	14.86	48	0.4	5.62		2
BeetRoots	0.00	0	0.0	0.00	39.10	2
Break_fast_cereals	81.31	449	3.5	287.42	421.50	2
Carrot	0.18	1	0.0	0.00	35.50	2
Cheese	1.44	20	0.2	0.23	393.30	2
Honey	0.00	0	0.0	0.00	303.00	2
Ice_Cream	0.00	0	0.0	0.00		2
Insects	0.11	5	0.0	0.00	140.00	2
Jam	0.00	0	0.0	0.00		2
Mushroom	0.26	1	0.0	0.00	23.00	2
Other_food	29.01	248	2.0	56.64	0.00	2
Roundnuts	0.90	2	0.0	0.01		2
Salad_Cream	0.00	0	0.0	0.00		2
Sit_down_meals	3.52	19	0.1	0.53		2
Soup	0.10	1	0.0	0.00		2
Spaghetti	0.00	0	0.0	0.00		2
Sugarcane	0.00	0	0.0	0.00	51.30	2
Takeaway	0.29	33	0.3	0.08		2

Footnote: Items not in the basket were either not consumed by a significant number of households or was not clearly defined/identified.

TECHNICAL NOTE B

Derivation of food basket and poverty lines for pass 2003 (Reproduced from MPSLSW, 2006)

1. Introduction

A food basket is a bundle of food items. This bundle is expected to meet minimum energy and nutritional requirements per capita per day. Costing such a basket gives the Food Poverty Line (FPL). In the case of Zimbabwe, *the Food and Agriculture Organisation (FAO) and the World Health Organisation (WHO) recommend a minimum food energy intake of 2 100 kilocalories per person per day for an average active*

person. A basket meeting the 2 100 minimum energy requirements is assumed to meet the necessary nutritional requirements.

2. Derivation of a Food Basket and Food Poverty Line.

There are two methods that can be used to derive a food basket namely Expenditure- Based and Least-Cost, to give rise to an Expenditure- Based and a Least- Cost Food Basket respectively (Lanjouw, www.undp.org). Costing the basket then gives the FPL.

2.1 The Least-Cost method

The Least-Cost approach considers that basket of food items "plausibly consumed in a given setting (not wildly inconsistent with prevailing tastes" (Lanjouw, www.undp.org) that meets the minimum caloric energy requirements at lowest cost based on prevailing prices. Impliedly, the method considers the cheapest food items that meet the basic caloric and nutritional requirements.

To get the FPL cost the food basket using the prevailing prices.

The advantage of the Least-Cost method is that it does not require detailed household consumption data. Some informal sense of the items that could reasonably form the basket, prices of food items and their caloric content is sufficient. However, the approach has limitations in that it does not take people's preferences (actual eating habits) into account. In reality, people do not necessarily purchase the cheapest calories. Furthermore, the linear programming process used in determining the least- cost basket can become complicated and not transparent to the ordinary person.

2.2 The Expenditure-Based method

The Expenditure-based food basket looks at the actual expenditure patterns of the poor. The first 30 items mostly consumed by the poor are then recommended to form the food basket.

The steps followed in the derivation of an expenditure based food basket are:

- Convert all the data collected in the household consumption expenditure section to one reference period using the Consumer Price Index[11]. In PASS 2003 the reference period was November 2003 since most of the survey data collected was for that month;
- Calculate total household expenditure;[12]
- Convert all the household expenditure to a per capita measure;
- Sort by total per-capita expenditure in ascending order;
- Look at the consumption patterns of the poorest segment of the population by selecting households falling into the 2nd to 5th deciles (bottom 40% of the population)[13];
- Calculate mean expenditure per capita per month for each food item[14];
- Find the proportion of households consuming each food item;

[11] The food expenditure was adjusted by the food CPI and the non-food expenditure by the non-food CPI.

[12]Total household expenditure includes food and non- food expenditure.

[13] The 1st decile was excluded to avoid possible data errors.

[14] Total food expenditure was calculated by adding up expenditure from purchases, own production and transfers.

- Find the weighted mean expenditures for each food item (mean expenditure multiplied by proportion of households consuming);
- Rank these weighted mean expenditures in descending order;
- Select the top 30 items to form the food basket; and
- Determine the caloric value of each food items.

PASS 2003 collected data on the cost and amount of 49 food items likely to be consumed by households. Prices of food items were obtained by weighting prices from quantities and values given by households for purchases, own production, stocks, public and private transfers as reported in the household questionnaire. Prices from shops and markets were not used as the price series was unreliable[15].

Some food items that would otherwise be in the food basket[16] were left out as they were not clearly identified.

The Expenditure-Based method has the main advantage that it recognises preferences of the poor people. While the requirement for detailed household consumption data that measures both quantities purchased and values (amount spent) is often cited as a limitation of the Expenditure- Based method, this was not a limitation for PASS 2003. PASS 2003 collected detailed household consumption data.

The calculation of the **Expenditure- Based FPL** entailed that after deriving a food basket, monthly average food expenditure per capita and the corresponding average number of grams per capita per month consumed by the bottom 40 percent of households were calculated using weighted prices[17] calculated from quantities and values of items consumed by households and collected during the survey. The grams per capita were then converted into calorific values per capita per day using Irene Chitsiku's study on "Zimbabwe Food Items and Nutritional Values" and also the International NutriBase on Medical Research Centre health information website for those items not in Chitsiku's paper. Subsequently, the total calories consumed per capita per day from items in the food basket and mean monthly expenditure on them was determined. The 2 100 kilocalories were divided by the total kilocalories consumed and multiplied by the sum of the mean monthly expenditure for each item to get the FPL.

Steps followed in the calculation of the FPL:

- Calculate monthly mean expenditure per capita for all items included in the food basket;
- Calculate corresponding number of grams per capita per month using the PASS 2003 weighted prices of food items. (Amount of grams consumed per item = Expenditure per capita per month on the item divided by cost/price of the item per gram);
- Determine kilocalories for each food item;
- Calculate total kilocalories per day per capita from the selected food items;

[15] During the period there were shortages and some commodities were not available in shop at the time of interview but were available in the "informal markets" at very high parallel market prices. Items like flour, mhunga, rapoko, breakfast cereals, cheese, fruits, cabbages, green mealies, green beans, potatoes, sweet potatoes, coffee/tea/chocolate drink, take away cooked food, sit down meals, alcoholic beverages and non-alcoholic beverages were never listed for price collection in the Institutional questionnaire.

[16] Alcoholic beverages, beans/porridge/corn soya blend, breakfast cereals, other food, sit down meals and takeaway.

[17] The weighted price was in proportion to households consuming from a particular source of a food item. For example the proportion of households obtaining maize from purchases and at a particular price, obtaining maize from own production at a particular price, obtaining from public assistance or other transfers at a particular price. The weighted price is a mean of prices from the different sources.

- Calculate the sum of mean monthly expenditure per capita for these items; and
- The FPL = 2 100 (recommended kilocalories per capita per day) divided by total kilocalories per day per capita multiplied by the total mean monthly expenditure per capita.

Household expenditures were converted to a per capita measure. However, the per capita measure assumes that consumption is equally shared among household members and that there are no economies of scale accrued due to purchasing of items in bulk for households with many members. In reality there are differences in consumption expenditure among different members of a household. The alternative is to use equivalence scales to determine consumption/expenditure shares of household members. This would give household consumption requirements based on differential requirements of members of a household. However, calculation of equivalence scales can be problematic and controversial and was therefore not preferred. South Africa, Ghana, Cote D'Ivoire and The Gambia have different equivalence scales. Rigorous tests in Ecuador showed that poverty profiles did not change when the per capita and equivalence scales measures[18] were used (Lanjouw, www.undp.org).

3. Estimation of Non–Food Elements

The FPL is necessary, but not sufficient in the determination of a benchmark of human basic requirements and poverty classification of an individual. There is therefore need to estimate the cost of basic non-food items such as housing, clothing, education, health, lighting/ heating, cooking and transport and add it to the food poverty line so as to get a Total Consumption Poverty Line (TCPL). There are various methods which can be used to derive the TCPL as given below:

3.1 Traditional Poverty Line

This is equal to the average of the total expenditure[19] of households whose monthly food expenditure is equal to the FPL.

Steps in calculating the Traditional poverty line:

- Take the complete dataset with all households;
- Rank the households by monthly food expenditure per capita in ascending order;
- Calculate the median total monthly expenditure per capita for households with food expenditure around the Food Poverty Line (take small intervals +/-1%, +/-2%, +/-3, +/-4 and +/-5%); and
- Average the 5 median figures and this gives the Traditional Poverty Line.

The advantage of the traditional poverty line is that it is easy to calculate and is likely to provide for all basic non-food items without compromising on food expenditure. The limitation of the traditional poverty line concept is that in reality there may not be any persons with food expenditure per capita which is exactly equal to the FPL. Secondly, the underlying assumption is that people with total expenditure below this poverty line would be expected to have food expenditures below the FPL and vice versa. However in reality this may not be necessarily so since as income increases the total food budget share decreases.

3.2 Austere Poverty Line

In calculating this poverty line the average non-food expenditure of people whose total expenditure is equal to the Food Poverty Line is determined. This average is then added to the FPL.

Steps in calculating the Austere poverty line:

[18] Different combinations of equivalence scales were used.

[19] Total expenditure is monthly expenditure on both food and non-food items. Technical Note II details how monthly expenditures on food and non-food items were calculated.

- Take the complete dataset;
- Rank the households by total monthly per capita expenditure in ascending order;
- Calculate median non-food expenditure per capita for household with per capita total expenditure around the poverty line (take small intervals +/-1%, +/-2%, +/-3, +/-4 and +/-5%);
- Average the five observations of median non-food expenditure per capita; and
- The average is added to the Food Poverty Line to get the Austere Poverty Line.

The main assumption of this approach is that if a household has the ability to obtain the minimum food basket, but chooses to divert resources to buy non-food items, the household must clearly view these non-food items as essential. The basic assumption is that those poor are rational and responsible people who will not spend on items that are not basic and therefore the austere poverty line would resolve the question of what constitutes basic non-food expenditure[20]. The limitation of this approach is that it may take some non- food expenditure that may not be basic into the calculation. The method is also likely to leave out some non-food expenditure that could be essential.

3.3 Selected Basic Non-Food Expenditure Approach

Specify items that could be considered basic non-food items such as education, health, transport, clothing, fuel and housing for the poor. Find mean expenditure of basic non-food items. Add this mean to the FPL to get a TCPL.

Steps in calculating the selected basic non- food expenditure:

- Take the complete dataset with all households;
- Rank the household by total monthly expenditure in ascending order;
- Select the bottom 40% of households;
- Calculate the mean expenditure per capita of basic non-food items including shelter, electricity, transport, health and education; and
- Add the mean expenditure of the basic non-food items to the FPL.

The advantage of the method is that the basic non-food items are clearly defined. The major limitation is that some of the basic non-food items are likely to be left out of the calculation. This method can be considered very arbitrary and paternalistic to a large extent as there is no objective standard or consensus in terms of which non-food items are essential for a minimum standard of living. In addition, expenditure on items such as education can vary from primary sector/fees to school books, *i.e.* it is not clear which expenditure items to include or exclude.

3.4 Non-Food Expenditure Share Approach

Use the share of non-food items expenditure to total expenditure for the poorest 40% of the population to scale up the FPL. For example: if the non-food expenditure of the bottom 40 percent is 20 percent of their total expenditure, then multiply the FPL by a factor of 1.25[21] to get the TCPL.

The advantage is that this method is easy to calculate and therefore commonly used for its simplicity. The disadvantage is that it may include non- food items that are not basic. The composition of items in the 20 percent is not clear.

[20] In reality the poor do not always spend on basic non- food items but instead engage gambling, take hard drugs or excessive alcohol to name just a few stress management practices of the poor.
[21] The factor is equal to 1/(1-0.2).

TECHNICAL NOTE C

Calculation of monthly household consumption (Reproduced from MPSLSW, 2006)

Calculation of monthly food consumption expenditure[22]

Expenditure per month was collected for each household per each food item. Sources of household expenditure considered were; purchases, own production, public transfers, private transfers and stocks. For households whose monthly expenditure was not recorded but quantity of the food item was recorded, the expenditure was estimated by multiplying the quantity with the enumeration area average price. The household food expenditure for each item was converted to a per-capita measure by dividing it by total number of people in the household. The per-capita expenditures for each item were summed to get total household per-capita food expenditure. The expenditures were adjusted using the consumer price index (CPI)[23] to reflect November 2003 prices.

Calculation of monthly non-food household expenditure[24]

The household non-food expenditure for each item was converted to monthly expenditure using the reference period given in H5 of the PASS 2003 household questionnaire[25]. Therefore, monthly expenditure was equal to the expenditure given divided by the reference period given for each item. The household non-food expenditure for each item was then converted to a per-capita measure by dividing it by the total number of people in the household. The per-capita expenditures for each item were summed to get total household per-capita non-food expenditure. The expenditures were adjusted using the consumer price index (CPI)[26] to reflect November 2003 prices.

Total monthly household expenditure

The total household expenditure was the summation of food expenditure and non-food expenditure.

Estimation of monthly rent

Rent is a user cost which is usually paid for using a facility by a person/entity using the facility. The facility can be residential or commercial. In the household questionnaire not all households reported expenditure on rent for accommodation for several reasons, therefore there was need to impute rent. This was done for tied accommodation (a person living in tied accommodation occupies it by virtue of his or her job. The accommodation belongs to the employer and is made available as part terms of employment. If the person leaves the job he/she is required to move out of the dwelling unit. Examples of this type of accommodation include plantation and commercial farm compounds, industrial and factory compounds, domestic workers' compounds, railways and some teachers' houses, PASS 2003 manual page 70). Rent was also imputed for owner/purchaser occupied houses. (An owner or purchaser is the one who owns the house or is in the process of buying it. Most people living in communal lands occupy their dwelling units in terms of communal land tenure rights[27] and were recorded as owners). Household in owner occupied houses and tied accommodation might not be required to pay rent but there is an opportunity cost for using their own houses or company houses. This cost or benefit is a rent, which somebody could be

[22] PASS 2003 collected expenditure on 49 food items.

[23] The Consumer Price Index used was obtained from CSO. The food expenditure was adjusted using the food CPI.

[24] PASS 2003 collected expenditure on 51 non-food items.

[25] "Last term" in the PASS 2003 household questionnaire referred to a period of three months.

[26] The Consumer Price Index used was obtained from CSO. The non-food expenditure was adjusted using the non-food CPI.

[27] In communal tenure ownership of land is held by the State while the occupier has user rights.

paying to them if the accommodation were leased out hence, should be recorded as rent in H6. The imputation of rent was done for all households (rural and urban) whose rent was not recorded.

Rentals for houses are area specific; houses located in the same area are usually charged similar rent. For PASS 2003 it was therefore recommended that, where a household was not paying rent, it should be assigned rent that is equal to the rent being paid for similar dwelling units in the area, (See PASS 2003 manual page 65). While it is ideal to calculate the average rent per room per enumeration area (EA) and use it to impute rent for those households with no rent recorded, it is likely that some rural EAs will not be having any rent recorded at all since very few households may be recorded as tenants or lodgers in K1 in these areas. PASS 2003 adopted the approach used in PASS 1995 to impute rent for these areas.

Imputation of monthly rent in urban areas

The PASS 2003 manual instructed that, for imputation of rent, one would ask the question, "If a similar dwelling unit were to be rented/leased in the same area how much would it cost?" (Zimbabwe Second Poverty Assessment Study Survey 2003 Training and Field Manual page 65). This was done to ensure that every household had an entry for rent either as imputed or as real. For households in urban areas whose rent was not recorded average rentals from the same enumeration area were used. For households that paid mortgage, the mortgage was considered as the rent.

The following steps were followed to impute rent in urban areas:

- Calculate the average rent per EA per room = Average (H6/k5).
- Household imputed rent = EA average rent per room * rooms occupied by the household in the same EA (k5).

NB for each household establish from k5 of the household questionnaire the number of rooms they are using.

Imputation of monthly rent in rural areas

The following formula was used to impute rent in rural areas:

- Estimate annual cost/ value of using own house as annual rent (R)

$$(R) = \frac{\text{Current Value of house as recorded in K13 of household questionnaire}}{\text{Actual Life of the house (15 years)}}$$[28]

- Monthly rent from the occupied dwelling unit (r) = R /12

It is assumed that annual rent for owner occupied houses is approximately equal to the annual income the household would get if it sells that house. Therefore, imputed rent (H6) for households in rural areas whose rent was not recorded = r.

All rural homes are assigned a life span of 15 years (Ministry of Local Government, Public Works and National Housing)[29]. Rural homes are mainly composed of Traditional Dwelling Type or Mixed Dwelling Type and Other Structures. These houses are an old style family settlement in which a number of buildings are made of pole and dagga or bricks with thatched roofs or buildings of brick with a corrugated iron roof.

[28] Mixed, Traditional and other structures were given a life of 15 years because the thatch roof requires repairs at short interval (5 years) (Ministry of Local Government, Public Works and National Housing).

[29] See 1995 Poverty Assessment Study Survey Main Report page 443, Appendix VI

TECHNICAL NOTE D

Summary of the main characteristics of the group of poverty measures (Reproduced from MPSLSW, 2006)

Measure	Equation	Notes
1. The Head Count Index	$H = \frac{q}{n}$	• suitable for poverty comparison studies • easy to interpret and communicate • one of its drawbacks is that it is insensitive to differences in depth of poverty
2. The Poverty Gap Index	$PG = \frac{1}{n} \sum_{i=1}^{q} [(Z-Yi) / Z]$	• good measure for poverty depth • good indication of the potential for eliminating poverty by targeting transfers • it may not capture differences in the severity of poverty
3. Foster-Green-Thorbecke Measure	$P_{\alpha} = \frac{1}{n} \sum_{i=1}^{q} [(Z-Yi) / Z]^{\infty}$	• suitable for the measurement of the severity of poverty • ability to order distributions that reflect severity of poverty • when $\alpha = 0$ the measure takes the value of H the Head Count. When $\alpha = 1$ it takes the value of the poverty gap

Where:

q = Total number of households below the poverty line
n = Total number of households
Z = Poverty line
Yi = Total income per person of the ith household

Paper prepared by Joyce Malaba (Independent Consultant Statistician/Researcher)
5 Bargrove Close, Glen Lorne, Harare, Zimbabwe
Cellphone: 263-411808233
Fax: 263-04-774554
Email: mochy@ecoweb.co.zw