

# Combining Quantitative and Qualitative Methods in Assessing Chronic Poverty: The Case of Rwanda<sup>☆</sup>

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**Summary.** — This paper addresses the issue of chronic poverty in Rwanda, an issue which has not been addressed specifically in the policy debate, despite the fact that it is likely to be widespread. In part this has reflected lack of available evidence, in that the conventional sources used to analyze chronic poverty are not available. We argue in this paper that by judicious combination of existing qualitative (a high quality nationwide participatory poverty assessment) and quantitative sources (a household survey) it is possible to identify and characterize a clearly distinct group of chronically poor households, whose characteristics are different from the poor as a whole.

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## 1. INTRODUCTION

This paper aims to demonstrate the value, as well as the need, of employing a multidisciplinary approach to the analysis of chronic poverty in Rwanda. By combining methods and disciplinary perspectives, we are able to explore the current lack of understanding of chronic or persistent poverty (Hulme, Moore, & Shepherd, 2001) in Rwanda. A specific focus on chronic poverty is important for the understanding of poverty, with the persistent nature of much deprivation being a key message in most qualitative poverty assessments, and it is also important for policy responses (McCulloch & Baulch, 2000), often predominantly informed by quantitative analysis.

At a methodological level much analysis of chronic poverty to date has been based on quantitative data, in particular using panel data sets (Baulch & Hoddinott, 2000; McKay & Lawson, 2003). While this has been very informative, it also suffers from significant limitations (in terms of the limited understanding it

provides of the factors and processes underlying chronic poverty; the short time periods it typically focuses on; and its susceptibility to measurement error). As such there is a strong case for combining qualitative and quantitative methods to understand the extent, pattern, and nature of chronic poverty. Moreover, in many countries—as in the case of Rwanda—the

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absence of panel data and the importance of the issue of chronic poverty means that a different approach is essential.

In Rwanda chronic poverty has not focused significantly in the poverty reduction dialogue, despite the fact that there is strong *a priori* reason to believe that it is likely to be a very important phenomenon (taking account of its very low GNI and HDI values; high levels of poverty; relatively high inequality; severe land pressures; moderate levels of HIV/AIDS; and the enduring legacy of the devastating 1994 genocide and civil war; as well as anecdotal evidence). The absence of focus on chronic poverty partly reflects a lack of evidence. This paper therefore was motivated by a very pragmatic concern: to form a relatively quick judgment on the nature of chronic poverty in Rwanda drawing on existing information sources, which could feed into existing policy debates around the Poverty Reduction Strategy.

The paper draws on an appropriate nationwide participatory poverty assessment (PPA) in conjunction with a conventional household survey. The specific tools were each conducted for other purposes and we do not claim that this represents an optimal methodology. Rather we argue that by combining them we can draw relatively quickly important insights about chronic poverty in Rwanda which could not be obtained from each source individually, and which have important policy messages. Indeed we also consider that there is much wider scope to combine qualitative and quantitative information in assessing chronic poverty.

This paper is structured as follows. The following section discusses the concept of chronic poverty, among other things setting out the case for drawing on both qualitative and quantitative methods in a multidisciplinary approach. Relevant background on Rwanda, including recent poverty findings, is presented in Section 3, while Section 4 discusses the PPA that forms the basis of our analysis. Section 5 then explains how the PPA is combined with the household survey to identify chronically poor households in Rwanda. This then leads into a discussion in Section 6 of the characteristics of those that have been identified as chronically poor, and shows that these core chronic poor groups have important distinct characteristics that differentiate them from other poor households. Section 7 concludes, briefly discussing policy implications and focusing particularly on the value of a combined

qualitative and quantitative approach in assessing chronic poverty.

## 2. UNDERSTANDINGS OF CHRONIC POVERTY

Chronic poverty is generally understood as poverty that persists over a long period of time, which in different instances may be several years, a generation or several generations. The key point about chronic poverty is its past and perceived future persistence, the likely inability to escape poverty in any reasonable time horizon. Chronic poverty contrasts with transitory poverty where individuals and households move into and out of poverty over time, depending on factors such as the state of the harvest, prices, or opportunities for wage labor. Different policy responses are likely to be appropriate to these two types of poverty (Hulme & Shepherd, 2003)—even though it is not always straightforward to make this differentiation precisely in practice.

The difficulty for many people of escaping from poverty and its persistence is an issue that features strongly in many PPAs (including in the case of Rwanda here). Despite this, to date, discussion and analysis of chronic poverty have tended to rely mainly on quantitative methods, using longitudinal or panel household survey data and focusing on income (or consumption) poverty. The focus on income poverty partly reflects the volatility of income/consumption, so that measures at a single point in time do not capture longer term dynamics well. This contrasts with several other aspects of well being where measures can often provide more insight about the past, including illiteracy, stunting, and ownership of different categories of assets.

However, panel data typically cover relatively short time periods (generally a few years) and involve a limited number of waves (typically two or three observations). And the links between poverty persistence over horizons of a few years and those over substantially longer periods—a key aspect of chronic poverty—are not known. In addition, such panel data sets do not provide information about poverty status in the periods in between the years when households are observed.

Another significant issue is the effect of measurement error.<sup>1</sup> This becomes important in analyzing panel data, in that measurement error at the individual household level is often substantial. To the extent that this is idiosyn-

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