

## Chapter 4

### Balancing pessimism of the intellect and optimism of the will: Some reflections on the capability approach, gender, empowerment, and education

Elaine Unterhalter

#### 4.1 Introduction

A long line of feminist theorists and practitioners note the many guises of education as a key component of empowerment. The concerns of the capability approach with empowerment, participation and education resonates with many features of feminist politics and practice. However, the notion of empowerment is open to many interpretations, not all of which sit comfortably with a politics concerned with feminist practice and gender justice. The relationship between empowerment and education is also neither simple, nor clear. This chapter sets out to examine some of the history of the term empowerment, and the implications of that history, which takes in both acquiescence and challenge to existing forms of power for thinking about gender, education, and participation. A key theme is the potential of the capability approach in contributing to analytically grounding how one views empowerment and associated forms of practice.

The discussion begins with a review of some of the recent discussions among feminist activists of how the term empowerment has been co-opted and taken away from meanings of solidarity and opposition to injustice. It sets this struggle over the meaning of empowerment within a wider historical context, exploring how two meanings of empowerment have long existed, drawing on some of Gramsci's ideas about hegemony, *transformismo*, the complex forms of institutions, and the interplay of moments of pessimism and optimism to understand this process. In the second part, the chapter looks at work on empowerment and capabilities considering the different modalities of education they invoke. It discusses how a number of moves associated with the capability approach suggest some ways of anchoring the concept of empowerment in relation to balancing analytically between Gramsci's pessimism of the intellect and optimism of the will.

#### 4.2 Education and empowerment: a history of co-optation?

Although, from around the mid 1990s empowerment was a term frequently used by feminist or other activists to delineate processes of participatory social change, in which old relations of inequality and exclusion were to be challenged and reconfigured by forms of economic participation, consciousness raising or collective action (Batliwala, 1994; Kabeer, 1994; Kabeer, 1999), there is currently much dissatisfaction with lack of precision about the word and its co-optation (Cornwall and Brock, 2005; Batliwala, 2007; Prugl, 2015; Calkin, 2017) The semantic range empowerment has travelled moves from feminist concerns with personal and collective action for justice and equality through business and new age self help to become a buzzword for the World Bank, keen to ingratiate itself with critics, strip away meanings of dissonance and close off dissent. A special issue of *Development in Practice* in 2007, looked at the emergence of what were termed 'buzzwords and fuzzwords' in 'development speak'. These terms have often worked to divert critical discourse, and constructed a hegemonic order of apparent consensus, around the projects of powerful actors (Cornwall, 2007; and Eade, 2007; Cornwall and Rivas, 2015). An article in the 2007 collection by Srilatha Batliwala drew on decades of experience of social activism in India. She documented how the concept of empowerment had undergone a distortion, losing its contextual resonance and becoming formulaic (Batliwala, 2007, 557). Her account showed how the word was wrested from a collective to an individual meaning and has been used to justify the dismantling of welfare states. Her reflections considered how empowerment had been a key concept for feminist activists because it allowed engagement not just with patriarchy, but with formations of class, race, ethnicity, caste and religion, encouraging integrated and connected social activism which challenged the ideologies that justified social inequality, and the material patterns of distribution and control. In its initial formulations empowerment urged a transformation of institutions, structures and organisations, such as the family, the state, markets, education and the media (Batliwala, 2007, 558-560). Part of Batliwala's reflection draws out how a key thread in the development of the notion of empowerment was the work of participatory, popular education activists in India concerned with conscientisation and engagements with power both individually and collectively. But the co-optation of empowerment entailed the separation out of elements of this connected process of transformation. In India the political economy of the 1990s, which combined an opening up of the market and the need to gain votes from the rural poor, meant that certain development actors detached elements of the

transformatory dynamic of the empowerment approach, but still used the term. Thus the focus of practice on women's savings schemes, microcredit, and women's political representation at local level became technical moves in which the transformatory engagements with inequality receded. Thus educative processes were either frozen or distorted and some form of limited articulation of liberty – for example gaining a loan to engage with the market or voting, displaced or undermined larger solidaristic concerns with participation oriented towards equality.

This process of stripping out the transformative potential of the notion of empowerment by large development actors has been noted in the Middle East (Tadros, 2010; Skalli, 2015), in Bangladesh (Faraizi, Rahman and McAllister, 2011; Kabeer, 2017) and by analysts in Latin America and Africa (Luttrell et al., 2009; McFadden, 2010; Anderson and Patterson, 2017). For empowerment critics the term is only useful in helping to identify the political discourses it shapes and how these might obscure features of disempowerment (Eyben, 2008; Sharma, 2008; Anyidoho and Manuh, 2010; Cornwall and Rivas, 2015). However, a wide range of authors, including Batliwala, have argued for the need to take forward a struggle over the meaning of empowerment by reclaiming agendas and spaces for discussion about women's rights and empowerment and actively resisting the strategies that aim to impoverish women or violate human rights. For example Eyben and Turquet (2013) document the work of feminist employees of large development organisations who aim to promote social justice and human rights, partly through struggles over the meaning of empowerment, and creative strategies to maintain links with radical women's organisations. Gideon and Porter (2014) describe trying to orient aspects of health interventions around reproductive rights to concerns with empowerment. Pallas (2011) shows how using a limited element of empowerment associated with registering women's land claims has considerable resonance with regard to agricultural policy and aspects of women's rights to social participation. The Pathways to Women's Empowerment hub located at the University of Sussex, while critiquing the co-optation of the notion of empowerment, has also done a great deal to document the creation of empowerment from below, describing ways of engaging powerful actors and disputing definitions animated partly by experiences of the women's movement as a network of projects for change (e.g. Kabeer, Sudarshan and Millward, 2013; Cornwall and Edwards, 2014). Connell (2010), Koggel (2010) and a number

of other contributors to a special issue of *Development*, as well as many commentators in the run up to the formulation of the Sustainable Development Goals (SDGs) argue for a strategic re-engagement to reclaim the concept of empowerment (Sen and Mukerjee, 2014; Cronwall and Rivas, 2015; Narayanswamy, 2016) . What all these initiatives suggest is that the important strand of the reclaiming of empowerment for a social justice project is concerned with educative and participatory processes that expand understanding of unjust relationships, make connections beyond limited techniques of development intervention, and challenge hierarchies.

To understand these processes some of the theoretical resources associated with the work of Antonio Gramsci are particularly useful. Gramsci's notion of hegemony was formulated in *The Prison Notebooks* (1971) in order to understand how a dominant class relies not only on physical force to maintain control, but, also on persuasion and the construction of consent through cultural institutions. Hegemony entails a mix 'of force and consent, which balance each other reciprocally, without force predominating excessively over consent' (Gramsci, 1971, p. 80). Thus it invites the oppressed to participate and collude with their oppression. When the balance of force and consent is disturbed in some way, Gramsci outlined *trasformismo* as one possible response of the dominant class. *Transformismo* entails a process by which select leaders of oppositional movements are incorporated into the ruling party, weakening the strength of opposition, Gramsci's analysis drew on events he observed in Italy in the early 20th century when the institutional processes of democracy were particularly fluid. Robert Cox (1993) and Bill Paterson (2009) have argued that the notion of *trasformismo* can be applied both to the domestication of oppositional movements and to oppositional *ideas*. It illuminates how their educative potential is neutralized and diverted, so that they come to serve not the powerless, but the powerful:

... the ideas and language of those individuals and organisations that mobilize public support for systemic change are absorbed and then written into the official documents, policies, and procedures of the target political institutions. As a consequence, the language and rhetoric of the political institution changes, but the principles that determine the substance of the policies and procedures of the institutions do not change... *Trasformismo* acts like a mirror, deflecting criticism but

also reflecting the normative language and ideas back at the public through official documents and elite rhetoric. In doing so, a new 'common sense' is established and consent constructed (Paterson, 2009, p. 47).

One can read an analysis, such as that made by Batliwala (2007), as arguing that empowerment has gone through a process of *transformismo* working to construct implicit consent to injustices. What are the institutional processes that have supported this process and though what engagement with shifting institutional norms and educative processes might the hegemonic balance tip back away from the powerful and towards a project that supports the claims to justice of the powerless?

In the next section I want to give four vignettes from the history of the use of the word empowerment to draw out how struggle over its meaning is not new, and that ideas about who may or may not participate in an educative project and particular institutional norms is a key dimension of how ideas about empowerment are deployed. This historical reflection, which shows how one can make both a pessimistic and an optimistic reading of empowerment, is intended to frame the third part of the discussion where I look at how writings on the capability approach and empowerment expand some of the analytical resources for giving the term some conceptual edge in connecting it more firmly with a challenge to hierarchies, exclusions and injustice.

#### **4.3 Some moments in the history of empowerment**

I have selected four instances from the deployment of the term empowerment to show how the word has long been a site of contestation in which features of education, participation, institutional norms, gender and women's rights feature, and that their alignment is not straightforward. These complex palimpsests of ideas suggest to me, a pessimistic reading of empowerment, associated with existing hierarchies of power, how empowerment can be co-opted, through a version of Gramscian *transformismo*, and an optimistic reading which shows some historic conjunctures when the concept moves towards concerns with equalities, participation and social justice.

In these four vignettes from earlier moments in the deployment of the term empowerment formal education can be positioned as an outcome of empowerment or as a process associated with its articulation. But the nature of that relationship may be top-down or bottom up depending on the historically located form of the institutional norms in which the term is struggled over. Empowerment, they suggest, might be about excluding women or about addressing inequalities through forms of participation. The multivocality of the term means that in itself it cannot delineate engagements with equality and that the historical specificity of the institutional norms, rules and regulations in which it is embedded need to be understood. Because of this lacuna, I will then argue, the capability approach provides some important additional conceptual connections that help link empowerment more closely to ideas about social justice and an understanding of the institutional space in which this is to be achieved.

To 'empower' as a neologism was first used in the mid 17th century in England in the context of the Civil War, a major political upheaval and intense struggle over what power was, who should share it with whom, and why. In this struggle many of the institutional norms that had been taken for granted for centuries were examined. However, interestingly in this context, the first uses of the term in 1641, 1643, and 1655 all refer generally to men being 'empowered' by the law or a supreme authority to do certain things, deputising, that is standing in for those above them (OED, 2014). Empower might be about extending the reach of existing institutions, it is not necessarily about troubling their boundaries, while it may admit those who had been excluded, admission does not imply transformation. Given the social relations of the time, in these early expressions women are generally excluded from this form of empowerment. Early English Books Online gives one of the first instances of the word in a petition presented to Parliament by Sir John Sidley on 30th August 1642, in which the people of Kent, that is the men of the county, ask Parliament to 'impower' them by sending them weapons with which to defend themselves against the Cavalier party's forces (Kent, 1642). Hamon L' EStrange, a devout Protestant Royalist landowner, writing in 1655 in a book about the Reign of King Charles used the word to describe the illicit organisation of an all male Jesuit College in Clerkenwell, London, and how members of the College, disparagingly noted as 'foxes' had letters from the Pope 'empowering' their educational work, most notably establishing a library. Although L'EStrange is hostile to this

undertaking, he uses empower to describe a process of authorisation. In both these examples it is men who are empowered reflecting the gender hierarchies of authority in the society. Education, in the L'Estrange example, is an outcome of authority.

Twelve years later, on the other side of the Royalist–Parliamentarian political divide, but from the same religious orientation, Milton used the word 'empower'd' in *Paradise Lost* to describe the entry of Sin & Death into the mortal world through Satan's designs. Death is male, but Sin is female and can be read as either embodying widely circulating ideas on the culpability of women, or a framing device, so that women are used to articulate the most malevolent ideas of men. Here, a woman is empowered, but the word is linked with her taking monstrous form:

'Thou hast achiev'd our liberty, confin'd

Within hell-gates till now: thou us empower'd

To fortify thus far, to overlay.

With this portentous bridge, the dark abyss' (Milton, 1667, Book X, 368-371).

To 'empower' is about the authority given to wreak fear and evil associated with a shift in power relations and a subordination of the accepted norms through a new balance which bridges 'the dark abyss'. Here this is articulated by two symbolic figures, who disturb the good order of the world and turn it upside down. Through monstrous strength, not something schooled or learned, they erect the 'portentous bridge' which allows suffering, pain and all evils to enter and reorient the institutional order. To 'empower' is to receive power bestowed by Satan; no 'work' or reflexive learning is entailed. Unlike L'Estrange's evocation where empowerment is rooted in existing structures and organisations, however illegal, Milton's notion of empowerment signals a form of authority that is transgressive, uncontrollable, establishing norms that distort and destroy. This might be an extreme version of *transformismo*.

Whether in the 19th century empowerment continued to mean deputising for some higher authority remains to be investigated. Possibly as forms of accommodation were attempted with different configurations of political, personal, and religious expressions of power, and

new institutions formed, empowerment might have come to be used in a range of different ways. A detailed semantic history of empowerment exploring this is yet to be written. However a major shift is apparent in the 1960s, where the phrase comes to mean an expansion of individual agency, and the importance for institutions to recognise this. The establishment of formal structures of justice and equality, be these Constitutions, education systems, or legal rulings, initially failed to engage with experiences of exclusion, discrimination or oppression, which those outside elites encountered daily. These formal organisations also did little to undo historically established structures or relationships of inequality, although social movements of the excluded were often successful in forging a notion of a collective 'we' sometimes across national and international boundaries to make demands for empowerment (Omvedt, 1990; Tilly, 2004; Fennell, 2010).

The notion of agency and empowerment was partly an attempt to affirm the importance of institutional norms engaging with this aspect of experience. Whether or not the notion of agency also entails ideas about solidarity and addressing collective injustices is something that is struggled over. The bridge to this different meaning appears to come through liberation theology, the black consciousness movement in the USA, and a range of social movements that form across locales in India and Western Europe. (For some examples see Drèze and Sen, 2013, 259-262).

A key educational site for this confluence in the USA appears to be Highlander School in Tennessee. Here from the 1940s Myles Horton and a group of social activists, deeply committed to education and social change, developed ideas about adult education, participatory dialogue, and addressing injustices associated with class and race (Horton, 1997; Glen, 1996; Duncan, 2005). Although accounts of the early phase of work at Highlander stress the ground-breaking approach to race, rather than gender, it is evident from the large number of women involved, and the creativity of their achievements, that the ethos of the school was associated with challenging contemporary ideas of submissive or silenced women.

Horton struck up a dialogue with Paulo Freire, which continued to the end of his life (Horton and Freire, 1990). Martin Luther King, Rosa Parkes and the folk singer Pete Seeger all spent

time at Highlander, and the transmutation of the song *We shall overcome* from an initial version associated with personal salvation to an articulation of collective solidarity through addressing peace, freedom and friendship drawing on beliefs that lie 'deep in my heart', but express experience. These changed renditions were brought about by women composers and singers at Highlander, notably Zilphia Horton and Septima Clark (Jones, 2014; Duncan, 2005). We can see at Highlander that the established institutional form of the school, where authority is conferred on some, but not others, was being challenged. In this process who is authorised to talk or sing or question comes to be reconfigured and the notion is expressed as empowerment associated with an aspect of human agency to remake institutions in the name of a particular group addressed in terms of 'we'.

In this process empowerment came to be reframed not pessimistically in terms of deputising for the powerful, but optimistically as a word that expressed a sense of human agency and *through this* a notion of the sense that one can make a different institutional order that is responsive to those who have been excluded, subordinated or subjected to inequality. At Highlander this is linked with an education process that is the sense of challenging and reshaping unjust political and social relations, and critiquing how power was used.

The notion of that power needing radical transformation, in the context of the acute inequalities associated with racism, colonialism, sexism and violence, was a signature theme of many movements of the 1960's, which grappled both with the overt and visible forms of oppressive power and also the way it corroded the ideas of those subjected by these forces. Although Gramsci was not translated into English until the early 1970s, one can interpret some of these explorations as reflections on hegemony and *transformismo*, and an engagement with education to try to expose some of these processes.

Here are some extracts from Martin Luther King. My preliminary reading of his works highlights for me ways he was reflecting on power in the last two years of his life. He appears to have been trying to work out, partly in response to the Black Power movement, that there is a need for a new word concerned with power that expresses different kinds of relationships to those associated with brutality, hierarchy and exclusion, which is the more

conventional terrain of the concept. However, King himself does not use the word 'empower'. In *Where Do We Go from Here?* (King, 1967a) his fourth and last book, largely written in Jamaica, at some distance from the tumultuous events of the early 1960's, he reflected on discussions with members of the Black Power movement and the implications of the social movement concerning struggles for civil rights. In a passage reflecting on the work of Frantz Fanon and the legacies of violence and colonialism associated with Europe he writes:

If we want truly to advance a step further, if we want to turn over a new leaf and really set a new man afoot, we must begin to turn mankind away from the long and desolate night of violence. May it not be that the new man the world needs is the non-violent man? ... We must be hammers shaping a new society, rather than anvils molded by the old. This will not only make us new men, but will give us a new kind of power. It will not be Lord Acton's image of power that tends to corrupt or absolute power that corrupts absolutely. It will be power infused with love and justice, that will change dark yesterdays into bright tomorrows, and lift us from the fatigue of despair to the buoyancy of hope. A dark, desperate, confused and sin-sick world waits for this new kind of man and this new kind of power (King, 1967a, p. 66).

The text shows him expressing a new form of power, giving it meaning, historical location, direction, normative orientation, even symbolic form, but not naming it. King's new man reaches to others through the medium of love and justice, seeking to form institutional norms, which work against the grain of violence, and draw on knowledge and reflection. In this King, the Baptist Minister, draws very closely on ideas in the New Testament about power bestowed by God enabling people to do extraordinary things. These excerpts from the King James Bible (2001) indicate some of this feature of the Christian notion of grace, that is of humans transcending limits

Isaiah 40:29: He giveth power to the faint; and to [them that have] no might he increaseth strength.

Acts 1:8: But ye shall receive power, after that the Holy Ghost is come upon you: and ye shall be witnesses unto me both in Jerusalem, and in all Judaea, and in Samaria, and unto the uttermost part of the earth.

Acts 6:8: And Stephen, full of faith and power, did great wonders and miracles among the people.

Revelations 11:3: And I will give [power] unto my two witnesses, and they shall prophesy a thousand two hundred [and] threescore days, clothed in sackcloth.

It can be seen how potent this idea of power is, when put to the service of refusing to accept given categories of race or class or gender, that is, the delineations imposed by existing institutions.

One year later in one of the last pieces he wrote King gave more detail as to what this new power entailed when he wrote about the importance of engaging Black political, economic, consumer, creative and intellectual power. 'We must frankly acknowledge that in past years our creativity and imagination were not employed in learning how to develop power...' (King, 1967b, p. 303). This was a theme he developed in his final speech, given in Memphis the night before he was assassinated, when he encouraged consumer boycotts, pooling black economic resources and what he called 'a dangerous unselfishness' (King, 1968). These are all elements of empowerment, with the stress on institutional norms which develop collective confrontations with injustice, the importance of insights revealed by a teacher, who uncovers not the cruel relations of how things are but the transformed relationships of how they could be. What is striking about this speech is his view that *learning* is part of developing a new kind of power that expresses his vision of love and justice.

The fourth vignette is an explicit statement about education. It comes from a speech by Angela Davis, a theorist and activist on race, gender and popular opposition in the United States. In 1987 in an address to Spelman College, she used the word empowerment to describe a particular kind of interconnection between political solidarities and activism,

formal education, and challenging gender inequalities linked with other kinds of oppressions. She commented on more black women gaining education and pointed out ‘as we scale the heights of empowerment, we must be willing to offer organized resistance to the proliferating manifestations of racist violence across the country’ (Davis, 1987, 300). She offered a notion of black solidarity giving historical examples of the Afro-American community striving ‘to lift as it climbs’. She depicted women ascending to empowerment and simultaneously lifting up those who experience oppression. She ended with a call to end racist war, oppression, homophobia, and making women invisible (Davis, 1987). The speech brings out the ways in which empowerment and education are institutionally located and linked with norms about solidarity and confronting injustice, not benefiting from it. The formal institution needs to lift as it climbs and address the forms of exclusion and oppression.

These historical vignettes indicate how empowerment has been a concept migrating between pessimism and optimism long before the struggles over meaning depicted in the last two decades. A key component of what is signalled by the meaning of the term often entails engagement with institutional norms and the place and nature of education, concerns with forms of equalities and processes of participation, and the issue of how power is transferred.

What this historical detour highlights is that empowerment as a concept can be deployed in multiple ways. I now want to consider how connecting empowerment more clearly with the conceptual vocabulary of the capability approach, and being more precise about what is entailed in the locus of regard, relationships, institutional norms and evaluation allows for clearer work in addressing injustice and may support engagements that point away from a terrain of co-optation. In this process some clear analytic links between particular modalities of education and empowerment become evident.

#### **4.4 Empowerment, capabilities and education**

The history of the wide variation in ideas of empowerment sketched above invites consideration of analytic work nailing down some key conceptual elements. There are two strands in the scholarship on empowerment and the capability approach which help to do

this. Firstly, there is work that has set out to define and nuance meanings of empowerment drawing on the range of concepts associated with the capability approach (Ibrahim and Alkire, 2007; Samman and Santos, 2009; Trommlerová, Klasen,., & Leßmann, 2015).

Unfortunately, this strand of analysis does not contain any engagement with the literature on education or any reflection on possible connections between education and empowerment. A second strand emerging from the literature on education and empowerment (e.g. Monkman, 2011; Murphy-Graham, 2012; Loots and Walker, 2015) tries to highlight the potential of the capability approach for this work, but does not fully engage with the debate about capabilities and empowerment. In this section I first discuss these two complementary literatures and then turn to my own reading of some of the work on empowerment and capabilities drawing out the potential this suggest to me for thinking about education, gender and participation.

Ibrahim and Alkire (2007) conducted a rigorous review of works on empowerment linking this with the capability approach, but, their discussion does not deal in any detail with education. In their analysis they emphasise the importance of linking empowerment with agency, and noting that forms of agency and empowerment are domain specific, so that empowerment in the household might differ from empowerment at work, but that the connections between these different sites of empowerment and agency require investigation (Ibrahim and Alkire, 2007, 383). This implicitly raises a question, unfortunately not addressed in their paper, concerning whether or in what ways developing agency in educational settings links with opportunities for empowerment in other domains. Their discussion acknowledges features of empowerment as expansion of agency and the links this requires with changes in the institutional structure (Ibrahim and Alkire, 2007, 384) that support the realisation of change. They outline a range of ways in which institutions can facilitate the expansion of agency through participatory processes associated with politics and decision-making, access to information and the capacity to hold those exercising power to account, and engagement with processes of social mobilization that aim to demand and effect change (Ibrahim and Alkire, 2007, 385-6). While this analysis draws out the importance of participation and information, it underplays education, both as an intrinsic component of the interface between agency expansion and institutional conditions, and as instrumental in enabling an enhancement of agency. Building on Ibrahim and Alkire's work,

Samman and Santos (2009) in work for UNDP emphasise the importance of multi-dimensionality and relationality in discussions of empowerment. They illustrate this with a number of economic examples, which offers pointers to thinking through some links with gender and education.

In complementary work a number of analysts working on aspects of gender explicitly bring out the link between education and empowerment. Karen Monkman (2011) in reviewing work on gender, empowerment and education, which builds on Stromquist's (1995) seminal article, has highlighted how much of the work on gender and girls' schooling uses noticeably under-theorised ideas about empowerment. But she also considers that work that draws on empowerment and capabilities is particularly generative. Monkman shows how in this work empowerment can be given individual, collective or institutional salience, but that undergirding all approaches is a concern with 'how power is negotiated, exerted and engaged by a variety of actors in diverse settings' (Monkman, 2011, 10). The nature of structures, and how they shape agency becomes particularly salient. Whether approaches stress the nuanced and contextualized notion of agency, she associates with work on the capability approach, or whether it is associated with more schematic mappings of relationship between individuals, groups and organisational forms, she highlights a complex relationship between education and empowerment now documented in a number of empirical studies (Unterhalter, Heslop and Mamedu, 2013; Murphy-Graham, 2012), Monkman (2011) points out that all this work shows that this relationship is neither linear nor direct. Indeed the relational dimensions, for example with differently situated men, with historically constituted and changing groups, with institutions understood both as organizations and sets of rules or norms, and with different meanings of power, are a key component of the kinds of social change which may or may not transpire. Thus the significance of context in analyzing capabilities is particularly important to understand what is being signalled by the use of the term empowerment, the educational processes involved and the forms of participation they do or do not entail.

I now want to try to delineate how some further clarification regarding the conceptual framing of empowerment using the capability approach can be made. I want to build both on the work by capability and education commentators and the discussion of empowerment

and agency to draw out three conceptual undergirdings, which I consider the capability approach provides to the notion of empowerment, and which I think can be useful in helping to resist some of the pull towards *transformismo* and co-optation. I consider that some clarificatory work in this area can help distinguish meanings associated with empowerment that are engaged with a path concerned with social justice, from those that are concerned with liberty without equality and social transformation.

Three analytical moves are associated with this process and each entails a position regarding education and participation. The first move emphasises the link between empowerment, capabilities and context and processes of education in mediating this. The second move develops the association between empowerment and agency, showing how education is an intrinsic part of this process. The third move illuminates a connection between empowerment and participatory processes of evaluation.

In these moves it is modalities of learning and teaching that are stressed, but clearly this process can only happen given appropriate institutional conditions. Each of these moves entails examining the notion of institutions through two meanings – firstly, that concerned with organisational forms, such as the establishment of a school or a learning circle; secondly that concerned with normative relations, for examples hierarchies between teachers and learners or the valuing of participation, experience and dialogue as chronicled at Highlander. In recent work (Unterhalter, 2013; Unterhalter, 2015 forthcoming) I have tried to outline what I have called reflexive comparative education and an intersection of addressing, through education, the inequality of what, the inequality of whom, and the inequality of how. These pedagogic, institutional and research processes attempt to critically locate the form of the education organisation, to examine the norms which guide it and to present pedagogic challenges which try to change it. One aspect of this is an evaluative move associated with comparison. This is a stance associated both with research and practice, and suggests a relational dynamic which asks how and why people and processes engaged in education are taken to be similar and different, what the consequences of this are, and what particular processes are needed to sustain social justice outcomes. This reflexive evaluative form of education resonates to some extent with accounts of the pedagogy at Highlander (Horton and Freire, 1990; Duncan, 2005). These

modalities of education, I suggest help us to engage with some of the questions concerning different forms of contemporary inequalities. They chime with delineations of empowerment by writers on the capability approach, and together with some of the conceptual moves the approach entails, help refine discussions of empowerment suggesting a practice regarding how it may be used in the direction of equality and social justice, rather than simply agency for any purpose.

The significance of context and acknowledgement of human diversity is a key element of what the capability approach adds to other normative frameworks, such as those concerned with needs, rights or primary social goods (Sen, 1984; 1999; 2009; Nussbaum, 2000, 2005). Alkire and Ibrahim draw out how empowerment in one context may or may not have a bearing on empowerment in another, and many of the studies of education, empowerment and capabilities, show how particular contexts empower and expand capability sets for some groups but not for others (Wilson, 2011; Greany, 2012; Tao, 2013). An important dimension of the co-optation of the notion of empowerment, as described by Batliwala, Cornwall and others, has been its detachment from the contexts in which it was formed. The importance of assessing context, capability expansion, and the question of empowerment is an essential evaluative task, which requires dialogue, participation, and assessments of power relations. In all of these processes education, understood in terms of the deployment of knowledge and understanding through learning, teaching, critical questioning and reflexivity plays an important role.

Here is a passage from Sen's (1999) classic work on the capability approach, *Development as Freedom* which exemplifies this. A key element in evaluating well-being for Sen is not only what the current state is for any person, but that person's freedom or opportunities to function differently. These are capabilities and there is a sense in which empowerment is both the personal state of having a wide capability set, high quality choices and freedom to act, and the relationships that bring this into being and sustain these opportunities. Thus context is both actual and potential, and reflexive education in considering and aspiring to realise this is a component of this:

... the empowerment of women is one of the central issues in the process of development for many countries in the world today. The factors involved include women's education, their ownership pattern, their employment opportunities and the workings of the labour market. But going beyond these rather "classic" variables, they include also the nature of the employment arrangements, attitudes of the family and of the society at large towards women's economic activities, and the economic and social circumstances that encourage or resist change in these attitudes... Nothing, arguably, is as important today in the political economy of development as an adequate recognition of political, economic and social participation and leadership of women. This is indeed a crucial aspect of "development as freedom" (Sen, 1999, 202–3).

In this passage the link between empowerment and context is highlighted at many points. It is associated with particular factors of classic variables like women's education, ownership, and employment, but it is also located in arrangements at work, in the family, and in social relations 'that encourage or resist change'. In addition context is mediated by the changing agency of women, which has 'extensive reach'. Empowerment of women and the education that accompanies this at work, in families, in social relations needs to be set in particular contexts that help understand 'its determination as well as consequences'. This carries significant normative dimensions expanding both women's own capabilities and agency and affecting the whole reach of development studies. What this passage emphasises for me is that understanding women's empowerment entails an assessment of agency and context. In order to undertake this, part of what is needed is a reflexive form of education that implicitly or explicitly suggests questions regarding what change is happening, why, who is resisting or supporting this and what are some of the consequences. This process is not generated spontaneously, but is built and nurtured sometimes by formal processes and institutions, and sometimes by informal networks, connections, conversations, or flows of regard. This contextualised portrayal of empowerment, drawing on a reflexive comparative education, presents a very different viewpoint to the buzzword version of empowerment. A critical understanding of context, and the ways in which it may or may not support addressing injustice, thus appears an important dimension of the way in which empowerment is addressed through the capability approach.

A second set of resources from the capability approach is that empowerment is analytically linked with agency, and, in my reading, this connection requires an educationally informed reflexive stance. For Sen agency (and by implication empowerment) is not mere self interest, but an expression of a sense of fairness for oneself and due process for oneself and others (Sen, 1992, 56-69; Sen, 2006). Thus for Sen, empowerment can be used interchangeably with well-being and agency, which denote aspects of human life that should be taken into account when we evaluate how individuals and groups are doing and what social change is needed (Crocker and Robeyns, 2010, 61). Undertaking this evaluation rests on some process of education and engagement with others that entails participation.

In defining agency, Sen invokes what he sees as its historical reach. In distinguishing his use of agency from economics and game theory literature on principal-agent relations he notes:

I am using the term “agent” not in this sense, but in its older – and “grander” – sense as someone who acts and brings about change, and whose achievements can be judged in terms of her own values and objectives, whether or not we assess them in terms of some external criteria as well (Sen, 1999, 19).

Now this older sense of agency, has echoes with the extract from Martin Luther King; power bestowed for an end or a purpose, cementing or challenging existing authority. Crocker and Robeyns (2010) draw out how agency is both intrinsically and instrumentally important for Sen, in facilitating considered judgment and participatory processes. Alkire (2010) sees this latter process as agency being constructively important enabling judgements to be made. In her earlier work looking at development projects, she used the term empowerment mainly in association with agency achievement (Alkire, 2002, 131). Nussbaum refers to empowerment as a stage of agency achievement (Nussbaum, 2005) generally for women in a case of fully realised rights, entitlements or capabilities (Nussbaum, 2000). Thus in contrast to the 17th century meanings, where empowerment is about authorisation, empowerment as agency and well-being deployed by writers using the capability approach is a recognition of a particular normative aspect of human-ness and aspiration to improve conditions to achieve this. In this its connection to Martin Luther King’s writing is clearer. Education is one move associated with this aspiration. Defining empowerment as agency

means that it is neither about authority, legitimation or usurpation. It is also, in this sense not primarily about negotiations with power, but much more about a transfer of regard concerning how human action is understood. It is here that educative processes in formal schools or political movements appear to be signalled. It is possible here that meanings of agency are open to co-optation but Sen's link of empowerment to social change, and the features of solidarity Davis depicts, as an important component of empowerment provide some bulwark against this.

A third way in which empowerment is invoked in work on the capability approach, is as a feature of participation and deliberative democracy at a local, national and a global level. Sen (2009, 249) talks about development as a 'fundamentally... empowering process' considering, in the context of sustainability that 'this power can be used to preserve and enrich the environment and not only to decimate it' and drawing attention to how 'our power to intervene with effectiveness and reasoning' can be enhanced by processes of development such as increased education for women (ibid). Here the transfer of power associated with empowerment is one not of the world turned upside down, as in Milton's use for example, but of the world made better because of empowerment and deliberative processes of reflection. Drydyk draws on this in examining an ethics of empowerment and attempts to use the term to distinguish comparatively between states and forms of exercise of social power that are more or less empowered for poor people. For example Drydyk (2008, 231) identifies empowerment with a process whereby poor people 'exercise enhanced decision-making and influence over strategic life-choices and barriers to agency and well-being freedom,' and notes that when their capacity for decision-making in these areas has been enhanced, their capability set expands and they can sustain gains. Empowerment here is a process, but it is not just immersive, something you may or may not have sufficient amounts of. It is also evaluative. It denotes not only an individual or collective set of thoughts, relations and actions, but also the active process of distinguishing the empowered from the disempowered state. Empowerment is an active educated process of making particular kinds of deliberations and evaluations (Penz, Drydyk, and Bose, 2011). The parallels with the discussions at Highlander are striking.

The multivocality of the term empowerment means that the word in itself cannot delineate engagements with equality and social justice. I have tried to show how three additional moves associated with linking empowerment, reflexive comparative education and features of the capability approach help to effect a kind of turn away from co-optation. These three moves – consideration of context, association with agency and other-orientedness, and participatory evaluations which facilitate distinctions between empowerment and disempowerment – all draw on features of reflexive comparative education where one setting and particular transformational actions is considered against another, in order to take on board normative questions. These three moves are intended to provide some additional conceptual connections that help link empowerment more closely to ideas about equalities, participation and social justice. I have also tried to show how particular modalities of education support these analytic moves that link the capability approach and social justice concerns of empowerment. Such modalities include understanding the contexts of learning, teaching and education governance, considering whether the content of education encourages an individualistic or an inclusive and solidaristic sense of agency, and organising learning moments to address making difficult evaluations and challenging taken for granted exclusions. It suggests participatory institutions looking both at organisations and the norms that govern them.

#### **4.5 Conclusion**

This discussion has attempted to draw out how an engagement with the terrain of education, recognising some of the historically located institutional dynamics of its different modalities is an important support for the participatory and transformatory orientations of empowerment. These analytical and practice moves, in my view, can work to make explicit steps towards an engagement with a feminist politics and practice oriented to social justice. The argument I have made has attempted to map connections between the concept of empowerment, different modalities of a reflexive form of education, some conceptual moves associated with the capability approach, and participation. This analysis was motivated by a concern to reclaim agendas and spaces for discussion about women's rights and empowerment and actively resist strategies that aim to impoverish people or violate human rights. A backdrop to this discussion has been Gramsci's motto regarding pessimism of the intellect and optimism of the will. It is sometimes hard, given the many injustices of

our time, to remember the multi-directionality of Gramsci's view, King's invocation of the 'buoyancy of hope' or Davis' celebration of solidarity. Each in their turn as they crafted their visions made points regarding both critical assessment and aspiration. While at the moment of writing each was isolated, denigrated, doubtful, each was also inspired by a notion that there could be something better, and that small steps, gestures, ideas and educative processes could play a part.

I have thus tried to show what some of these might be, and how some particular moves associated with linking the notion of empowerment, reflexive education and the capability approach might contribute to deepening ideas about equalities, social justice, women's rights and solidarities. These moves are careful, critical attention to the ways in which context shapes both actual and potential articulations of capabilities, how agency and empowerment need to be actively constructed in a direction of solidarities, rather than self interest, and how evaluation requires deliberative democracy and participatory processes. Much work remains to be done to investigate whether or how these processes work in practice, what resources, policies, and changes in norms might support empowerment projects to take this direction. The modalities of education, including how teachers are trained and supported, how learning is organised and resourced, and how relationships of inclusion, tolerance and equality are built, seems a good place to begin to investigate how we can try to make empowerment work to animate an optimism of the will.

### **Acknowledgments**

Many people have helped me think about the ideas for this paper, which has developed from earlier versions, initially written as a keynote address for the gender symposium at the CIES conference, Montreal, 2011, and reworked as a conference paper delivered at the BAICE conference, Cambridge, 2012. I owe especial thanks to David Clark, for his encouragement to keep on working up the ideas, and most generous assistance with all aspects of bringing the manuscript to completion. I am enormously grateful for this level of friendship and academic solidarity. Thanks also to Shailaja Fennell and an unnamed referee for some astute suggestions on building the argument, to Gabriella Pinto to alerting me to the importance of Gramsci in thinking through the process of co-optation, Joe Crawford for

help in thinking through some of the history of empowerment and to Peter Jarvis for telling me about Highlander.

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