

## Insights from and for education: the capability approach and South African girls' lives and learning

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[m.j.walker@sheffield.ac.uk](mailto:m.j.walker@sheffield.ac.uk)

*The question of the openness of curriculum and the reach of reason can be quite central to the role in promoting human security. If the schools fail to do that by 'thrusting smallness' on children, we not only reduce their basic human right to learn widely, but also make the world much more incendiary than it need be. (Amartya Sen 'Basic Education and Human Security'. Paper presented at Kolkata, 2-4 January 2002)*

### Introduction: why education capabilities

Why do we need another idea for understanding education given the plethora of approaches from philosophy, sociology, psychology and history? This paper sets out to show that the value of taking up the capability approach lies in the way it enables us to ask a different set of questions about education. It offers a counterweight to dominant neo-liberal human capital interpretations of education as only for economic productivity and employment and asks instead about what education enables us to do and be by fostering our human development and our capabilities. Are capabilities distributed fairly? Do some people get more opportunities to convert their resources into capabilities than others? Which capabilities matter most in developing agency and autonomy for educational opportunities and choices? In short, it means taking up the 'crucial' importance Sen (1999) allocates to education in the formation and use of human capabilities and the central question: are all children being taught that they are equally human, or not?

The relevance for education policy is that highlighted by Larsen and Istance (2001) of the OECD that we need to set clear goals, targets and priorities, and to monitor progress on equity in education. Here the proposed 'goals, targets and priorities' is achieving capability equality. The paper therefore uses the capability approach to develop ideas about what might count as 'education capabilities', so that we are clear about what it is we are looking to develop and evaluate. It sets out to select a list of education capabilities, drawing on diverse sources of argument and information from research, from policy and from girl's voices, and to attempt a rough and ready ranking and weighting of education capabilities. The idea is to select important education capabilities for evaluating quality and fairness in schooling, especially for girls. At issue, however, is not to produce a non-negotiable list. Rather it is to begin considering different sources of information, which might justifiably contribute to a set of working ideas, open to further development, public critique and educational action for South African education

in particular. No claims are made for the universal relevance or application of these education capabilities. Nonetheless, there is some attempt made to identify what might be core education capabilities, such that if these capabilities were not being fostered in diverse cultural contexts, we might have difficulty in describing the process at work as 'education'.

The paper assumes that education matters in that it is of personal benefit to individuals enabling them to lead richer lives, and that it is of benefit to society as whole; it is then both a private and public good, or as Jonathan (2001) suggests, a 'social' good at the nexus of individual and community benefit. Getting education is a matter of social justice. Moreover, schooling is a site for state intervention and public policy. As Brighouse (2000, p.120) importantly reminds us, 'equal schooling is something that government may and can aim at'. Put another way, ideally diverse learners should have access to equivalent learning opportunities (OECD, 2004). It further takes up Sen's core question, 'Equality of what?' and his argument that the choice of the evaluative space in which to assess equality determines what equality we prioritise. Narayan and Petesch's (2002, p.126) comprehensive study of the voices of 60,000 poor men and women from 50 countries states, without qualification, that the denial of education (schooling) 'perpetuates cycles of exclusion, disempowerment and marginalization'. Basic education leading to functional literacy and numeracy expands people's choices; it provides a basis for future opportunities. People are generally better off having had access to basic education. Above all, in trying to operationalise the capability approach in actual lives we need to assess education [schooling] according to 'its effects on things people value and have reason to value' (Alkire, 2004, p.3; Sen, 1992). Put another way, we need information or evidence on how resources for education are 'at work in the context of human functioning' (Nussbaum, 2001, p.440). But there are also complications. We must also keep in mind that schools might be places both of freedom and unfreedom (Unterhalter, 2003).

## **I The capability approach and its relevance for education**

Put briefly, Sen argues for the expansion of human capabilities as the central feature of the process of development. Capabilities are people's potential functionings and functionings are 'beings' and 'doings'. Functionings range from the basic (having shelter, having adequate nutrition, having functional literacy, having mobility) to the more complex (taking part in discussions with your peers, having mathematical and scientific training, and so on). The difference between a capability and functioning is like one between an opportunity to achieve and the actual achievement; between potential and outcome (for example being literate but actually choosing to read or not, or at a more complex level choosing or not to read literary works, newspapers, and so on). Thus, the notion of capability, 'is essentially one of freedom – the range of options a person has in deciding what kind of life to lead' (Dreze and Sen, 1995, p.11). Capability 'represents a person's freedom to achieve well being' (Sen, 1992, p. 48), so that 'acting freely and being able to choose. are...directly conducive to well-being' (1992, p.51). Sen (1992) further stresses the importance of choosing a life one has reason to value, that is a life reflectively chosen. Central to the capability approach, then, and key in addressing education are his concepts of 'agency freedom' and 'wellbeing freedom'. The former 'is one's freedom to bring about achievements one values and which one attempts to produce, while the latter is one's freedom to achieve those things that are constitutive of one's well being' (1992, p.57). If education's contribution to living a fully human life is

anything it then follows that educational policy and practice ought to contribute to agency freedom and agency wellbeing.

The key question for judging policy, and in the case of this paper, education policy, is thus to focus on the impact of the enhancement of people's capabilities and functionings, their valued beings and doings' (Dreze and Sen, 1995). Sen argues that education is an enabling factor in the expansion of freedom for a number of reasons. It is of *intrinsic* importance in that being educated is a valuable achievement in itself, for its own sake. Crucially, education is in itself a basic capability which affects the development and expansion of other capabilities. Having the opportunity for education and the development of an education capability expands human freedoms. Not having education harms human development and having a full life. This stands in stark contrast to human capital approaches to education in which the benefit of education is directly judged for its effect on employability. Instead, Dreze and Sen argue that the 'bettering of a human life does not have to be justified by showing that a person with a better life is also a better producer' (1995, p.184). Education also has an *instrumental* role for each person in helping him or her to do or achieve many things such as getting a job and being able to take up economic opportunities. Education is then for something else, for some other good. It fulfils an *instrumental social role* in that greater literacy and basic education fosters public debate and dialogue about social and political arrangements. It has an *instrumental process role* by expanding the people one comes into contact with, broadening our horizons. Finally, it has an *empowering and distributive role* in facilitating the ability of the disadvantaged, marginalized and excluded to organise politically. It has a redistributive effects between social groups, households and within families where better education is shown to reduce gender inequality. Overall, education contributes to interpersonal effects where people are able to use the benefits of education to help others and hence contribute to the social good. In short, 'education' is an unqualified good for human capability expansion and human freedom.

In moving towards an understanding of what might then be 'education capabilities', that is capabilities which taken together enable us to judge the impact on well being and agency of the process we call 'education, we must then assess education interventions according to the effects on things people value, and have reason to value (Alkire, 2004). Education is understood here to be a capability in itself, and education is also understood to be made up of a number of separate but intersecting and overlapping capabilities. Moreover, we need to keep in mind Nussbaum's (2000) point that if we aim to develop adult capabilities, this will likely mean requiring such development and functioning in children in order to produce a mature adult capability. Saito (2003) in her consideration of the capability approach and education turns to Sen's argument which emphasises not only the freedom a child may have in the present, but also the freedom they will have in the future. Saito quotes Sen as follows:

If the child does not want to be inoculated and you nevertheless think it is a good idea for him/her to be inoculated then the argument may be connected with the freedom that this person will have in the future by having the measles shot now. The child when it grows up must have more freedom. So when you are considering the child, you have to consider not only the child's freedom now, but also the child's freedom in the future. (interview with Sen, March 2001, quoted in Saito, 2003, p.25)

Thus, says Saito, following Sen's line of argument, 'when dealing with children, it is the freedom they will have in the future rather than the present that should be considered' (Saito, 2003, p.26). If a child is denied or restricted in his or her access to the goods of education, this will in return reduce opportunities in adult life and restrict individual

freedom and agency. Lifelong education then begins with the very young child. But this is not, of course, to deny children freedom and the exercise of agency in the present, but this will be in the context of support from adults and society.

At the boundary of functionings and capabilities is the matter of choice; where a person exercises his or her agency, having the requisite set of capabilities, to make choices from a range of options and alternatives, if such a choice achieves his or her well being. By agency, Sen means 'someone who acts and brings about change, and whose achievements are to be judged in terms of her own values and objectives, whether or not we assess them in terms of some external criteria as well' (1999, p.19). Agency is then one's ability to pursue goals that one values, and agency and well being are deeply connected. Because agency is also central to Sen's ideas of freedom to make choices, a lack of agency or a constrained agency equates to disadvantage. Thus for a society to be more fair, young people should have access to good schooling, that is schooling which is agency and well being enhancing and a primary good in itself, made up of bundle of primary 'benefits' (the things learnt at school) and agency, the freedom to make choices in their lives (Thomson, 1999).

Sen also integrates securing and expanding intrapersonal and interpersonal freedoms (individual agency and social arrangements). Crucially, 'functionings' (capabilities) depend on both individual and institutional conditions and contexts within which potentials (freedom) can be achieved. Freedoms, as Sen points out, depend also on social and economic arrangements (e.g. education, health care), and on political and civil rights. Individual functionings will be inflected by a person's relative advantages in society and enhanced by enabling public and policy environments, for example a gender equity policy in schools. As Sen explains, it would be mistake to think of achievements only in terms of active choice by oneself:

What people can positively achieve is influenced by economic opportunities, political liberties, social powers, and the enabling conditions of good health, basic education, and the encouragement and cultivation of initiatives. The institutional arrangements for these opportunities are also influenced by the exercise of people's freedoms, through the liberty to participate in social choice and in the making of public decisions that impel the progress of these opportunities. (Sen, 1999, p.5)

Viewing development as the expansion of freedoms, he argues, 'directs attention to the ends that make development important' (1999, p.1), that is, its intrinsic importance. In this way individual development becomes interwoven with wider issues around redistribution and equality in that development 'requires the removal of major sources of unfreedom' (1999, p.1)(e.g. poverty, social deprivation, neglect of public services). For example in contexts of poverty or political dictatorship, it is hard to argue that people have the substantive freedom to develop real alternatives and choices in shaping their lives. In situations of relative material disadvantage, any exclusion on a person's freedom to participate in the social political and economic life of her community restricts that person's capability set, for example under conditions of gender oppression which restrict the lives girls and women might freely chose to lead. Individual development, social development and freedom are all interwoven. As Sen explains, development is 'a process of expanding the real freedoms that people enjoy' (1999, p.1). Freedom and development are therefore dialectically and fundamentally related. This too is consistent with the approach that sees schooling and society as historically, politically and socially interconnected. Social structures of power and control exercised for example through structures of class, gender and race, will influence practices in schools. As we need to

identify sources of unfreedom in society, so we need to identify and change practices of unfreedom in schools.

Schooling, the particular focus of this paper, is an aspect of what is described as formal education, and which is normally partly or wholly funded by the state as a public good which contributes to overall social well being. Thus it ought to be the space of children and young people's capability to function necessary for capability in adulthood. The significance of schooling is returned to later in the paper, in that it opens out questions about taking education to be an unqualified good, or to be coterminous with schooling. It would enable us at the same time to recognise the ways in which schooling, curriculum and pedagogy might as easily generate capability 'deprivation', in other words alert us to the ways in which formal (and informal) education produces both equity and inequity, belonging and exclusion. Capabilities can be diminished as well as enhanced, and we need therefore to keep checking how well we are doing in schools and education policy implementation.

Four sources of information are drawn on in this paper; they are situated, preliminary and incomplete. The sources are:

1. capabilities from the idea of 'education' itself;
2. capabilities from research and scholarship;
3. capabilities from education policy in South Africa;
4. capabilities from voices of participants in education, in this case Year 10 girls, aged 15 and 16 years, in four South African schools.

It is important to point out that the girls' voices are drawn from a small group of 40 and more research is needed across different age groups and different areas and regions of, this case, South Africa. (1)

Moreover, as participants also affected by decisions made in education, the voices of parents, teachers and teacher educators should also be sought. Of course careful attention will be needed to develop the methodologies that enable multiple voices to be gathered and to 'measure' capability (see for example Alkire, 2002; Brighouse and Unterhalter, 2003; Schuller, 2004). But the practice of voice and participation is seen to be central. This approach is more or less consistent with Sen's capability approach (1992, 1999) in its deliberate incompleteness; Sen does not seek a complete ranking of options, nor stipulate which capabilities should be selected. Incompleteness is fundamental to his approach, and pragmatic. Sen argues that all the members of any collective or society 'should be able to be active in the decisions regarding what to preserve and what to let go' (1999, p.242). There is a real social justice need, Sen says, 'for people to be able to take part in these social decisions if they so choose' (1999, p.242). Thus Sen leaves his framework deliberately open, even vague, because of the importance for him of communities deciding what capabilities count as valuable. He does not stipulate which capabilities should count, nor how different capabilities should be combined into an overall indicator of well being and quality of life. For him a 'workable solution' is possible without complete social unanimity being required. Freedom, for Sen, (and one might argue following in a tradition, even if not made explicit in Sen, of educators such as John Dewey and Paolo Freire)(2) is concerned as much with processes of decision making as the opportunities to achieve valued outcomes. In other words, we make development and freedom by *doing* development and freedom.

But this does leave open how we might come to select education capabilities, and which capabilities we select. In addressing this, two further elements of Sen's capability approach should be borne in mind. It is concerned with the capabilities of each and every individual. Importantly, Sen's conceptualisation is not to be confused with the neo-liberal advocates of individualism and individual choice who arguably dominate current education policy making. The crucial difference is that the capability approach is ethically individualistic; neo-liberalism by contrast is ontologically individualist (Robeyns, 2002). The latter individualises choice, success and failure, and the social consequences that flow from personal choices. But in Sen's formulation individual freedom and agency strengthens social life, rather than fragmenting it. At issue is that Sen's work is informed by this ethical individualism – every diverse person counts - whereas the neo-liberal view grounded in an ontological individualism is driven by selfish self-interest. The implication for education is that while statistical indicators (for example how many children are in school, for how long, with what success in examinations) are important, these cannot tell us the whole story of how well children are doing in school. We need to find methods that enable us to scrutinise individual experiences and outcomes as well.

Sen further works with the notion of 'the basic heterogeneity of human beings', thus human diversity is central to and explicit in his approach to equality, not an add-on factor. Sen argues that, 'Human diversity is no secondary complication to be ignored, or to be introduced later on; it is a fundamental aspect of our interest in equality' (Sen, 1992, p.xi). People will differ along (a) a personal axis (e.g. gender, age, etc.); (b) along an intersecting external axis (wealth, climate, etc.); and, (c) along an inter individual axis which refers to differences in people's ability to convert resources into valued outcomes. Thus we cannot take boy's lives, or the lives of able-bodied people, or the lives of white people as the norm for our evaluations. Inequalities of gender, race and disability are included in and fundamental to the space of functionings and capabilities. Such differences affect our ability to *convert* the resources we have into capabilities to function. For example a disabled child with the same resources and opportunities as an able-bodied child will nonetheless find it more difficult to convert these resources and opportunities into capabilities (for example the capability for mobility for someone who cannot walk, the capability for enjoying literature for someone who is blind, and so on). We could say something similar for boys' and girls' capability development, for example in a context where girls numeracy is not valued, or where girls are not allowed out in public on their own. To enable capability development, schools and other educational organisations would need to recognise and value the variety of difference and the cultural resources students bring to learning. At issue would be both equality of opportunities and equality of agency (Rao and Walton, 2004).

There is a difficulty of sorts in focusing on education, one which might be taken up conceptually and methodologically, and should at least be kept in mind. When we talk about education at the very least we usually have in mind that some kind of learning takes place. But learning is seldom linear and immediate; it is more often recursive, new learning builds on existing knowledge, past experience and pupil identities (see Pollard, 2003). Thus learning involves 'evolving identity narratives' (Pollard, 2003, p.180). Learning is then a process of 'becoming' as well as 'being' over a life course, and through cycles of schooling. We might measure capability by some means or other through learning at a point in time using a specific assessment tool. But at another point that same capability might look different and the learning therefore be more or less successful, deep or sustainable than previously, with effects for an individual's learning disposition. For example, a child might be a successful mathematics learner in the

primary school, only to encounter difficulties with the subject or its teaching in secondary school such that earlier learning and the child's learning identity is undermined and instead of progressing further the pupil either gives up mathematics altogether or does progressively worse and worse in tests and examinations. It may also be that some capabilities are more or less important depending on the age of learners. Thus the capability for play may be more important for young learners than those in secondary school. This problematic is highlighted by Comim (2003) when he argues that 'becoming' in addition to 'being' and 'doing' is an important category of capability analysis. Development, he argues is necessarily dynamic and expansive so that we need to extend the capability informational space to take account of this. Capabilities are then valued 'beings', 'doings' (Sen, 1992, 1999), and as Comim (2003) argues, also 'becomings'. The implications for education are that where resources permit this approach, we need to find ways to measure learning over time. An example of this approach would be the 12 year longitudinal study of the biographies of a group of school pupils by Pollard and Filer (1996, 1999). This is not to say that we cannot analytically freeze a point in time of learning and voices of, in and on learning, but we should keep in mind that as a process of development, education will shift and change over time.

## II Capabilities from 'education'

This part of the paper argues that what we take to be 'education' gestures towards what we might select as education capabilities, although these are likely to be very broadly conceptualised. The main function of schooling as a process of formal education is to transmit values and attitudes (for example of tolerance, generosity, responsibility) and knowledge (of mathematics, history and so on) and skills (of reasoning, literacy, etc.). These reflect the dominant values current in a society as a particular expression of existing patterns of cultural, economic and political life, and whether to reproduce the social order or transform it. The meaning of 'education' therefore is always contested, with different interest groups having diverse views, for example: whether or not education is appropriate for girls; whether education is for human capital and economic responsiveness; whether education should be purely academic or include vocational training as well; whether disabled children should be taught in special schools or mainstream classrooms; whether schools should teach history from one point of view only or from many different perspectives, and so on (see Carr, 2003). At the heart of all these views are perspectives on society, theories of what counts as education, and theories of what it means to be fully human. We might argue, however, that not all rival conceptions of education contributes to human flourishing, for example education which encourages prejudice against a racial group, which tolerates or encourages the sexual harassment of girls or which treats those with mental disabilities as less than human. We might further argue that education of this kind would be deeply incompatible with the capability approach in which education is understood as enhancing agency, well being and freedom. But we might also argue that there are different conceptions of education compatible with human flourishing in so far as there is not necessarily one right view of the good life and the good society. The key issues here is to be clear that education enhances humanity, agency and freedom; it should not diminish lives.

Despite the contestation over the meaning of 'education' we might nonetheless usefully keep in mind Carr's (2003, p.7) broad definition that education's main task is 'to equip individuals with the knowledge, understanding and skills apt for a personally satisfying, socially responsible, and economically productive life'. For her part, Noddings (2003,

p.23) defines education as helping people 'to develop their best selves – to become people with pleasing talents, useful and satisfying occupations, self-understandings, sound character, a host of appreciations, and a commitment to continuous learning'. For her it follows that the central purpose of schooling is to develop intellectual capability and at the same time guidance as to an intelligent use of such capability in order to 'evaluate and direct change, to resist harmful changes and promote those that contribute to human flourishing' (2003, p.260). Noddings prioritises 'happiness' as the key aim of education such that a 'good education should contribute significantly to personal and collective happiness' (2003, p.1) because happy people 'are rarely mean, violent or cruel' (2003, p.2). 'Goodness and 'happiness' are then tightly interconnected. Education is for Noddings a deeply moral endeavour saturated with values as much as knowledge acquisition and requiring an orientation to act, to do some good in the world. She is thus concerned about the misery, boredom and unhappiness that too often characterizes schooling, and why so many people end up hating school. The quality of life in schools should rather yield some happiness, and children should be encouraged to put what they have learned into practice. In general then, we might wish to avoid a system of education which, argues Barr (2002), is an apprenticeship into a hierarchy of power, where dialogue and diversity are neither practised nor valued. We might further wish to acknowledge as integral to education, emotions and feelings so that an 'educated person' would both care about ideas and argument, but would also know how to sustain human relationships or respond directly to human needs and, indeed, see the value of this (Barr, 2002). These of course says little about how we are to operationalise these ideas with some practical precision but they do serve to remind us of the potential wellbeing gap between 'schooling' and 'education', especially given that education is meant to be what goes on in formal settings of schools, colleges, universities, and so on.

Moreover they begin to trace what we might describe as education capabilities, that is capabilities which we might expect education to foster, such that if they absent or being diminished we might seriously question if schools, for example, were providing education. A good example of this issue is offered by Unterhalter (2003) in her account of systemic gender violence perpetrated inside South African schools. Thus while human capability might be argued to be coterminous with education, it is not always coterminous with schooling. In the capability approach, education is a matter of substantive freedom. Sen, (1999, p.42) writes that individual freedoms are influenced by the social safeguarding of matters such as liberties on the one hand, and on the other the social provision of facilities such as education 'that are crucial for the formation and use of human capabilities'. But as noted, we should not equate education with schooling, although schooling may and arguably certainly should expand the agency and freedom of young people. Indeed, if education is valued by a society as a process of expanding agency and freedom, we would then want to locate this in the space of capabilities and ask further what information we need to judge to what extent education as schooling is indeed working in this way for each and every child. We might also argue that schooling is a primary good and essential for the enjoyment of a decent life and to developing those capabilities to live a valuable life commensurate with general social standards of well being. A lack of schooling, or a lack of good quality schooling is then a disadvantage, and one which might persist throughout a lifetime. For example in Gallacher *et al's* study of mature learners in Scotland, they emphasise the continuing impact of earlier experiences on people's perceptions of themselves as successful learners. They quote one of their interviewees: 'I had problems with my level of self esteem connected with my past educational experience. The discouraging thing is really inside me. It is this internal stuff that always comes back and beats me up (quoted in Gallacher et al, 2002,

p.506). A deep sense of failure at school might then reduce the chances of further educational agency and freedom.

Moreover, we need to be more precise about what we understand by learning if we assume that there is a necessary relationship between education and learning (Carr, 2003), and if learning is understood to be a good which benefits learners, enables them to flourish, to be and to become a human being with dignity. In other words, children might learn and schools might teach that gender violence against girls is acceptable, but this is emphatically not the interpretation of learning at issue here. There is also the matter of how children's social identities and biographies intersect with and influence what and how they learn at school, because schooling is embedded in society and influenced by the structures of domination and freedom that prevail. This view calls for a social theory of learning which 'analyses through identity and biography, a variety of cultural influences in producing the new learner' (Hughes, 2004, p.405, Pollard, 2003). A social theory of learning recognises both children's agency and also structures of nation, gender, class, and race. Osborn et al explain as follows:

[we] need to understand what it is that motivates and empowers an individual to take advantage of the learning opportunities available to them; to shift the focus of research concern away from the provision of educational opportunities, from the factors that influence the ability to learn and towards those that impact upon the desire to learn. (2003, p.9; original emphasis)

As Hughes (2004, p.401) points out, the individual learner is central to a social theorization of learning in that 'the focus of attention is on their life course or social learning biographicity as he/she moves through various institutional or organizational forms'. This resonates with Nussbaum's (2000) explication of 'adapted preferences'. As she points out, our preferences and choices are shaped and informed or deformed by society and public policy. Unequal social and political circumstances lead to unequal chances and unequal capacities to choose. These external (material as well as cultural) circumstances 'affect the inner lives of people: what they hope for, what they love, what they fear, as well as what they are able to do' (Nussbaum, 2000, p.31). Here is an example of restricted agency, that of Amma, a young black girl in inner city London who cannot imagine herself going to university:

I can't see myself with a degree. I don't know why, I can't...sometimes even at the back of my head there is always a kind of something saying that I am not getting there...a kind of barrier stopping me...I don't know if it's me stopping myself, or somebody else...(quoted in Ball *et al*, 2000, p.31)

People adapt their preferences and subjective wellbeing or choices according to what they think is possible for them, and formal education plays its part in this. Therefore we need to be circumspect in how we interpret people's choices, which they happen to express at some moment in time. Nussbaum reminds us to keep in mind the importance of ideal contextual conditions in which people are 'respected as equals, and free from intimidation, and able to learn about the world, and secure against desperate want' (2000, p.152).

While Osborn *et al's* emphasis is on those social and cultural experiences outside formal education which shape students' learning careers, offering or not resources for identity affirmation and identity formation through education, we still need to take into account what it is that schools do, and the specificity of how schools shape learning careers and alter life trajectories through 'having a place to become someone' (Thomson, 1999, p.16). Understanding that learning is shaped by experiences outside in families and

neighbourhoods, as well as inside school is emphatically not a licence to ignore matters of resource provision and their connection the ability to learn, as I try to show in looking at the comparative opportunities available to a group of South African girls, where the choice of secondary school in every case was grounded in finding the best resourced school each family could afford - good standards, safety for pupils, smaller classes, better trained teachers, and equipment. Provision of resources and opportunities in school and ability to learn, whatever biography pupils bring with them, are implicated in and impact on the desire and possibility to learn. Moreover, those children with little family history of schooling are likely to be deeply reliant on the school for access to learning goods, which will enable their social mobility and agency. We might then ask the important question: if our intention was to promote capabilities in education, how would we deploy our available financial resources? Overall, in looking at learning and education we need to consider the primary goods (resources, opportunities for learning and agency) of and in schooling, and the impact on the identity formation of learners, processes 'second only to force as the means by which power is effected in oppressive and exploitative systems' (Cockburn, 1998, p.5).

A social theory of learning fits well with the capability approach in that notions of agency are central to both, and both take into account that agency is structurally framed. Moreover the emphasis on children's voices that Hughes (2004) and others argue for as a matter of practice and research methodology articulates with Sen's (1992) commitment to participation, public debate and dialogue in fleshing out the capability approach.

### **III Capabilities from scholarship and research**

Scholars and researchers address education and something which might be called 'capability' in a number of ways. Here I focus on the arguments of five: Nussbaum (2000), Narayan and Petesch (2002), Robeyns (2002) and Alkire (2002, 2004) from the capabilities literature, and Brighouse (2000) from the perspective of education philosophy. Nussbaum (2000) has produced a list of ten core capabilities (see pp78-80); a threshold level of all the capabilities taken together are essential to a life worthy of the dignity of the human being in her view. Failure of capability in any one aspect would be failure to live a fully human life. Setting aside the importance for Nussbaum of each and every component on her list (nothing can be left out) we might still consider which of the capabilities might be described as education capabilities, while still acknowledging the importance of all those on the list, should we so wish. (But see for example Alkire, 2002 and Robeyns, 2002 for a critique of Nussbaum's list). Those capabilities she identifies which we might argue are fundamental to 'education' include capabilities of: practical reason, affiliation, senses, imagination and thought, emotions and play, while bodily health and bodily integrity would be essential social and institutional conditions. Narayan and Petesch's comprehensive research also presents a list of ten assets or capabilities, many of which overlap with Nussbaum's list and eight of which seem relevant to educational processes: bodily health, bodily integrity, emotional integrity (freedom from fear and anxiety, love), respect and dignity (self respect, self confidence, dignity), social belonging, cultural identity, imagination, information and education, and organizational capacity (the ability to organize and mobilize). In her evaluation of a literacy project in Pakistan, Alkire (2002) generates a list of capability impacts as follows: empowerment, knowledge, work, life, relationships, inner peace, and religion in which at least three (empowerment, knowledge, relationships) seem relevant to educational processes. Robeyns (2002) in her proposed list of 14 capabilities for gender inequality assessment

mentions a number of capabilities relevant to education, namely education and knowledge (having the freedom to be educated and to use and produce knowledge), respect (enjoying the freedom to be respected and treated with dignity), social relations (being able to be part of social networks) and bodily integrity and safety. She is careful to point out that the capability of education should focus on more than just credentials and degrees, but also pay attention to processes in schools and classroom which produce gender inequalities.

Turning to a philosopher of education, Brighouse argues that autonomy should be a fundamental value in the design of educational policy; 'all children should have realistic opportunity to become autonomous adults' (2000, p.65). Every child in school should 'have realistic opportunity' to become an autonomous person, because autonomy 'enhances dramatically the ability of individuals to identify and live lives that are worth living' (2000, p.88). Social justice 'requires that each individual have significant opportunities to live a life which is good' (2000, p.68). But it then also follows that children need to develop a sense of what it means to live well, to compare different ways of life, and to choose a good life for themselves. This in turn involves fostering the capability for critical reflection on one's own goals and values as 'an essential part of living well' (2000, p.67). Children should, argues Brighouse, learn how to access truth, weigh up evidence, investigate and think about their decisions and so learn a 'critical attention' to the options available to them.

This notion of autonomy seems similar to Nussbaum's capability of practical reason, which she describes as 'being able to form a conception of the good and to engage in critical reflection about the planning of one's life' (2000, p.78). But Nussbaum (2003) explains that she does not use the word 'autonomy' because of her emphasis on the distinction between capability and functioning. She is therefore not concerned with whether people are doing this planning and critical reflection, that is with whether they are functioning autonomously. She does insist that in the interests of democracy and tolerance in society, children 'not be held hostage to a single conception [of the good life]' (2003, p.42) but that they are exposed to diverse possible ways of living. Her concern is that they should have the capability to critically reflect and plan, and if they so choose to opt for a non-autonomous life in which this capability will not be exercised (functioning), for example, if a life in a traditional religious community is chosen. She argues that the state has no business telling adults 'that they are not leading worthwhile lives'. However, she has in mind adult choice; she is clear that in the case of children we require that they remain in compulsory education (schooling) until they have developed this capability, and others that are important to enable them to have valued choices, for example to exit from a traditional community. She states therefore that 'education in critical thinking and debate is a compelling state interest', and that children taught to develop (learn) these capabilities in debating complex and controversial social and moral issues 'can always reject the teaching later' (2003, p.42). In this she is in agreement it seems with Brighouse who argues for autonomy facilitating (capability) not autonomy promoting (functioning) education:

The argument claims that equipping people with the skills needed rationally to reflect on alternative choices about how to live is a crucial component of providing them with substantive freedom and real opportunities, by enabling them to make better rather than worse choices about how to live their lives. The [autonomy-facilitating] education does not try to ensure students employ autonomy in their lives, any more than Latin classes are aimed at ensuring that students employ Latin in their lives. Rather it enables them to live autonomously should they wish to. (2000, p80.)

And, of course, as adults to live non-autonomously if they so choose. Nussbaum is similarly clear on this. 'It is appropriate' she writes, 'that we shoot for capabilities, and those alone [i.e. not for functionings]. Citizens must be left free to determine their own course after that' (2000, p.87). Moreover, we cannot claim to want to foster autonomy in education and then say what kind of life pupils and students must then choose. This is helpfully illustrated by turning to Hannah Arendt (1977) who argues that education should not attempt to predict the needs of the future and to make education 'relevant' to the perspectives of government and employers. This would in Nussbaum's terms lead to 'preference deformation'. Instead Arendt was concerned to emphasise the unpredictability of the future and the possibilities of change, renewal and a better life through human agency coupled to educational processes in which no one 'strikes from their [students] hands their chance of undertaking something new, something foreseen by no one' (1977, p.177). As Arendt explains: 'The problem is simply to educate in such a way that a setting-right [of the world] remains actually possible, even though it can, of course, never be assured' (1977, p.192).

Brighouse (1998) would argue against the primacy of parental preference, if say parents choose to deny children the opportunity to learn the skills associated with autonomy because, say literacy, has never been part of a community's 'way of life'. Rather, children and young people need to learn about diverse ways of life, and to have the opportunities which make diverse choices possible in adulthood. . Moreover, Brighouse points out that the decision to have children affects those beyond one's immediate family or community; it is therefore not justified to resort to the argument that not allowing one's child to learn to read is nobody else's business. He argues that parent's worries that child might learn to read and acquire other skills from school such they decide to exit their traditional community are insufficient to constrain educational choices in that an autonomy facilitating education would not seek to forcibly detach children from their parents' culture.

This concern with practical reason, or autonomy facilitating education is underscored by Alkire's evaluation of the Khoj literacy project where the capability of empowerment identified by the women as of value has some features in common with the notion of autonomy. Thus the women identified the importance of being able to solve their own problems, of deciding for themselves what is good or bad. It also resonates with Narayan and Petesch's (2002) capability of 'informed and educated decision making' (p.463). Taking these writers, together with Sen, we might begin to argue that 'education' is a basic capability, and that the capability (but not the functioning) of practical reason/ autonomy is core to a process we would want to describe as education.

Might there be other capabilities drawn from those listed by these writers, and in the light of the philosophical arguments about what we take 'education' to mean, which could arguably be core to any educational process? From what we understand of how children learn, and who they take themselves to be through experiences of learning and interactions at school, it seems hard to deny that the Narayan and Petesch's (2002) capability of emotional integrity and Nussbaum's 'emotions' (which includes 'not having one's emotional development blighted by overwhelming fear and anxiety', p.79) should not be core. If we go back to the necessary relationship between education and learning, as Carr (2003) argues, then circumstances which inhibit learning are also circumstances which diminish human development. We might therefore argue that experiences of learning in school which instil fear and great anxiety in children (for example through the use of corporal punishment or verbally abusing children), or which destroy or inhibit the

development of children's confidence and voices are anti-educational processes. I have argued that increasingly our understanding of learning involves us understanding how children and young people come to form their identities in and through school and how schooling expands or restricts what they take themselves to be able to do, whether it raises or lowers expectations such that some possibilities seem inconceivable or improbable. For example, the child who is told she is 'too thick' to learn history; or comes to believe she is 'too stupid' to grasp poetry, or so fearful of being beaten that she wants only to flee the classroom. Or the child so upset at being publicly humiliated for some mistake or failure of understanding that no learning can follow. How we feel affects how we learn, or fail to learn.

We might further argue that Nussbaum's capability of affiliation, ('being able to live with and toward others, to recognise and show concern for other human beings, to engage in various forms of social interactions; to be able to imagine the situation of another and to have compassion for that situation; to have the capability for both justice and friendship...having the social bases of self-respect and non-humiliation; being able to be treated as a dignified being whose worth is equal to that of others' (Nussbaum, 2000, p.79-80)); Narayan and Petesch's (2002) capability of 'respect and dignity', Robeyns' capability of 'respect', Alkire's capability of 'relationships', and Brighouse's second core value of equality of educational opportunity including 'equal respect for the value of all individual persons' (2000, p.116) also constitute a core educational capability. Indeed Bonnet and Cuypers, (2003) suggest that what they describe as 'authenticity' (not dissimilar from affiliation) is 'a fundamental consideration that sets the contours of much that truly counts as educational activity'(p.340). It is, they say, integral to what it is to be 'a full human being'. Thus on the one hand autonomy develops our capability to own and take responsibility for our own lives and the consequences for and on others; on the other hand affiliation/respect and dignity means developing our capability for showing consideration to others, for understanding them, to participate in the human condition. Feminists, as Robeyns (2003, p.22) points out, 'have argued that the root of our gendered society is the fact that women are systematically devalued and not considered as fully human'. If we take education to be a process of becoming and being a full human being, evidence for the disrespect of girls (or for black children, or disabled children....) in South African schools would raise questions about whether education was indeed taking place in the site under scrutiny.

We might also refer to this as including the capability for 'recognition', where recognition from others is essential to the development of a successful and powerful learning identity, to self-confidence, self-esteem and self-respect. Such identities are always produced with and in relation to others. Honneth (1995) thus explicates recognition as comprising self-confidence, self-esteem and self-respect and the fundamental intersubjectivity of these processes for full identity formation. Repeated encounters with *mis*-recognition, the 'stigmatizing gaze of a culturally dominant other' produces a negative internalised self-image, as Fraser (2000, p.109) reminds us. Basil Bernstein (2000, p.6) in linking education, democracy and pedagogic rights argues for three interrelated rights, two of which are at issue here. The first of these is the right to individual enhancement which he sees as "a condition for experiencing boundaries, be they social, intellectual or personal, not as prisons, or stereotypes, but tension points condensing the past and opening possible futures". Thus enhancement involves 'the right to the means of critical understanding and new possibilities' as the condition for confidence, without which, he argues, it is difficult to act. This would seem to be fundamental to our developing personal autonomy. The second right, says Bernstein 'is

the right to be included, socially, intellectually, culturally and personally' (p.7). He acknowledges the complexity of this idea as including the right to be separate, but inclusion is the condition of 'communitas' so this right is social. Affiliation would involve capacities for confidence, sociability, empathy, compassion, respect, and would require conditions of inclusion and participation for its development.

The importance of affiliation (respect, recognition) relates to how one develops autonomy or agency if one's experiences of education through schooling work repeatedly to diminish one's sense of self – by non-recognition at best and active rejection of the value of one's language, culture, class, or ethnicity, or gender at worst. A spoiled identity is not a positive learner identity – being made to feel thick stupid, or being ashamed of one's accent, or home background, being sexually harassed because one is female whether by teachers or peers, or both. At issue is whether such practices are to be described as education, and what their effects are for agency and well being. Of course many people succeed in life despite such experiences at school and gain sufficient knowledge and skill despite this; but this does not make the process any more one of education. As one concerned school teacher in England has recently written of his own 'bullying' (threats, shouting) efforts to ensure his pupils succeed in examinations in the required numbers and with satisfactory grades: 'And at the end of it all, schools do get better results. But does it do us any good in the long run? Does it encourage children to think for themselves? I think it fosters a frightening passivity. And I fear that our [English] obsession with results is causing us to miss the point of education entirely' (Gilbert, 2004, p.5). As Noddings (2003) asks, why, despite the well documented misery of schooling for many do we continue to justify it with the excuse that 'Someday you'll thank me for this?' Of course we should also not romanticise the difficult conditions that obtain in many schools, but the reasons for this lie as much, if not more outside of the schools in the impact of socio-economic and cultural factors (see Thomson, 1999, Taylor *et al*, 2003).

Education is a social practice; we learn and we learn to be. At issue is that education is a process of becoming and being this kind of person rather than that kind of person; as we learn mathematics or history in formal educational institutions we gain knowledge and cultural understanding, that is we are also learning to be persons (kind, fair, competitive, selfish). Learning fairness in working and playing with others makes it possible to develop more complex capabilities of deliberation, respect and empathy, all of which expands the opportunities open to a young person to choose a life he or she has reason to value. However, this then points to the kind of educational conditions (teaching, learning, curriculum and assessment) which foster and enable successful and confident learner identities. We cannot assume that schooling necessarily enhances a child's capabilities; indeed it may even diminish or restrict them where some social and learner identities are valued and others are not. This brings us to the question of the values that schools and education teach, whether explicitly or implicitly. Saito emphasises the role education can play in its attention to values. 'We need to develop', Saito writes (2003, p.29), 'the judgement of the person to be able to value in which way it is appropriate to use capabilities through education'. Saito continues that the education that best articulates Sen's capability approach is one which develops autonomy and judgement about how to exercise that autonomy. We might then argue that that the capability of affiliation is core to making good judgements.

To this must be added the capability of knowledge incorporated in the school curriculum and subjects like mathematics, english, history, and so on, for education is about

acquiring knowledge (Alkire, Narayan), as well as about the process of acquisition. The school curriculum is always an intervention. Thomson (1999) points out that the school curriculum is a political arrangement, a selection from knowledge and a view on whose and what knowledge counts or is excluded or marginalized (whose history, whose science, whose authors and artists, and so on). Therefore, argues Yates (2003), it obscures important issues to have a project to extend education to girls and women and not take up curriculum as part of the agenda. In their comprehensive account of schooling and reform in South Africa, Taylor et al (2003) develop a social theory of schooling which draws substantially on Basil Bernstein's work (1971, 1977, 2000) in developing an account of children's access to knowledge and meaning, and which adds to the capability approach in its focus on the specificity of access to meaning and knowledge in classrooms. Famously, Bernstein argued that, 'How a society selects, classifies, distributes, transmits and evaluates the educational knowledge it considers to be public, reflects both the distribution of power and the principles of social control' (1971, p.47). Thus Taylor et al point out the importance of children having access to vertical knowledge structures and strong conceptual syntax, that is 'powerful' knowledge structures. Similarly feminist educationalists such as Paechter (2003) and Yates (2003) have pointed to the relationship between gender, knowledge and power in the school curriculum which works to disbenefit girls. While this may be less true now than in the past as girls in the UK, for example, succeed in subjects like mathematics in greater numbers than boys, it is arguably still very much the case in developing countries with deeply sedimented views of what girls can and should do. At issue is that the capability approach needs to keep in mind how knowledge and power work in schools to produce and reproduce inequalities, and to draw on educational theories that will provide ways of understanding such education effects. As Paechter (2003) points out, we need to devise strategies that genuinely allow girls and young women access to high status knowledge and the power that accompanies it. 'Students', as Thomson (1999, p11) argues, 'form their understanding of the world and their identities at least in part through the knowledges and narratives available to them in the curriculum'.

The issue here is having identified 'knowledge' as a core education capability, and having pointed to the importance of conditions of learning which facilitate autonomy and respect, we still need to ask how this occurs and for this we need additional theories, including theories about which pedagogic practices structure educational opportunities for children. Freire (1972) highlights the importance of how knowledge is mediated by teachers when he criticises what he describes as 'banking education' in which a teacher deposits knowledge into the blank and empty vessels of his or her passive students. He writes that knowledge instead should be a process of active inquiry: 'Knowledge emerges only through invention and re-invention, through the restless, impatient, continuing, hopeful inquiry men [sic] pursue in the world, with the world and with each other' (p.58). For Freire, a truly learning process is transformative, engaged, critical, curious. We then require theories and concepts of pedagogic practice which enable us to tease out and understand micro classroom interactions in accessing knowledge, and keeping in mind that capabilities intersect, developing other education capabilities at the same time. Taylor *et al* (2003) pose the question in this way: 'Which [pedagogic] practice, under the particular circumstances in question, is most likely to result in children acquiring the social and conceptual competence targeted by the intended curriculum?' (p.83). They point out that middle class advantage extends to having access to a mastery of the cultural and symbolic capital that enables middle class children successfully to access school knowledge and pedagogy, compared to working class children who do not have the coding orientations to make sense and meaning of school knowledge (Bernstein,

1971 and 1977, Bourdieu and Passeron, 1997). The point is that in the pedagogical relationship produced between teacher and pupils, there is the possibility to enhance agency but also the possibility to deny agency. We need to have the means to know and understand the difference and the impact on capability. To answer this we arguably need both capability theorising and additional theorising about learning and about identity formation.

We can and should name 'knowledge' as a key education capability, but then we need to think beyond this to what and whose knowledge and how it is acquired. Thus curriculum and pedagogy need to be the focus of our practical concerns and our attempts to develop ways to measure capabilities. How we come to know matters as much as what we come to know.

Finally, then, I would argue that practical reason (autonomy facilitation), affiliation (respect, recognition), emotional integrity and knowledge are core education capabilities such that if they were not evident we might have difficulty in describing the observed situation or practice as education. This is not to discount additional education capabilities which I would want to add to list, including 'imagination' (Nussbaum, Narayan and Petesch) which I would include as part of the knowledge capability (for example knowledge of literature fosters imagination), and as a key education capability for young children, 'play' (Nussbaum). This then leads me to my provisional list of education capabilities in schooling sites, and a preliminary attempt also at weighting such that the first four capabilities are core and all should be included in a normative account of 'good' education:

1. Practical reason (autonomy facilitation, empowerment)
2. Knowledge (imagination)
3. Affiliation (respect, recognition)
4. Emotional integrity
5. Play.

From education and research we might argue that unless at least the first four were present we might not have what could be described as 'education', nor might we confidently argue that in the absence of these four capabilities (and for young children the fifth also), that education was contributing to a fairer society, or powerful and positive learning, learner agency and human development. It may of course still be described as 'schooling', or 'training'.

Should a particular community agree that this is sensible list of capabilities to pursue in education, we might then, introduce questions such as asking, who has the power to develop these capabilities, and who has not? Put simply, in the context of girls schooling, which girls and how? We might wish to check (measure) how successful girls are in bringing about what they are trying to achieve. Finally, if there is unevenness, patchiness and inequality in girls' wellbeing freedom and agency freedom we might wish to raise political and ethical questions about the society in which some girls can promote all their ends while others face barriers, whether of social class, race, gender, culture or disability. At issue here is that interpersonal variations as well as individual capability must be considered. As Sen notes we need to ask 'what are the significant diversities in *this* context' (1992, p.117, his emphasis).

## IV The context of schooling and gender equity in South Africa

### (a) Capabilities from policy

If we turn to international policy first, we might keep in mind the Universal Declaration of Human Rights, Article 26 on education as human right which 'shall be directed to the full development of the human personality and to the strengthening of respect for human rights and fundamental freedoms. It shall promote understanding, tolerance and friendship among all nations, racial and religious groups, and shall further the activities of the United Nations for the maintenance of peace' (quoted in Alkire, 2004, p.2).

Especially for the purposes of this paper, there is also the Millennium Development Goal 3 to 'promote gender equality and empower women' (Alkire, 2004, p.2).

But I now turn to considering the specific context of education and education policy in South Africa in order to extrapolate capabilities from contemporary education policy. Briefly, following the democratic elections in South Africa in 1994, the remnants of apartheid legislation were removed and segregated and unequal education was finally abandoned. (3) The 1996 Constitution guarantees to everyone the right to a basic education, including adult basic education and commits the state 'through reasonable measures' to make further education beyond these four years available to all (South Africa, 1996, p.14). Schooling is now compulsory for all children for nine years. Moreover, the previous apartheid education policy which notoriously intended that African children should be schooled only for manual labour, and that all children should be schooled according to an authoritarian, hierarchical and paternalistic philosophy of 'Christian National Education', was replaced with a new inclusive education policy in 1996. This envisages an education system which contributes to 'the full personal development of each student', and to citizenship for the building of a democratic nation. It includes 'the promotion of gender equality' and 'encouraging independent and critical thought' (South Africa, 1996, p.4). The Department of Education, charged with implementing government policy expresses a vision for education as 'one in which all our people have access to lifelong education and training opportunities, which will in turn contribute towards improving the quality of life and building a peaceful, prosperous and democratic society' (DOE, 2003). Although not without its critics (for example, Jansen, 1998, Meerkotter, 1998), curriculum revision has culminated in Curriculum 2005 which is underpinned by curriculum principles of learner agency ('active learners', 'learners take responsibility for their own learning', 'learner-centredness'), a thin autonomy ('critical thinking, reasoning, reflection and action'), respect ('constant affirmation of their worth') and functioning 'what the learner becomes and understands' (see Meerkotter, 1998, p.59). Curriculum 2005 principles emphasise anti-discrimination, human rights, inclusivity, democracy, common citizenship, nationhood, and redress of past injustices (Chisholm, 2003). The latest census in 2001 also showed that in the age group 7 to 15, 94% of children were at school, and the average South African had half a year more of education than in 1996 (*Sunday Times*, 10 September 2003).

The 1996 Act identifies a purpose of education as 'the advancement of knowledge'; children still learn subject knowledge at school; and, policy encourages 'capacities necessary for reconstruction and development and knowledge and values for citizenship'. Thus there appears to be argument from policy for the capability of knowledge, even though education policy tends towards fostering knowledge instrumentally, rather than as a good in itself. It further introduced a language policy which replaces the two official

languages of apartheid South Africa (English and Afrikaans) with the official recognition of all 11 languages spoken in South Africa. This translates into a commitment to the right of every child to be taught in the language of his or her choice, but only where this is reasonably practical' (DOE, 2003), and to a vision of education contributing also to 'cultural development'. As the Human Development Summary Report of 2004 points out: 'Recognizing a language means more than just the use of that language. It symbolizes respect for the people who speak it, their culture, and their full inclusion in society' (p.20). Thus we should add the capability from policy of 'cultural recognition', an aspect of affiliation, but which in the light of South Africa's history, needs special emphasis as a separate capability.

The school leaving certificate (matric) which offers access to further education is a national examination for most subjects, taken at the end of year 12. The pass rate for this matriculation examination has continued to rise from a low of 47.4 % in 1997 to 73.3% in 2003. At the same time over 100,000 students failed. Many of course drop out before reaching matric; there is a low number of science and mathematics passes; and, the numbers writing matric have declined from 511,474 in 1999 to 440,267 in 2003 (*Mail and Guardian*, 2 January 2004). But the matriculation figures obscure the spread of results across different kinds of schools, with state schools in more affluent areas or with large numbers of children of professional parents performing very much better. Since the passage of the South African Schools Act in 1998, all parents pay fees at state schools, ranging from low at around R50 to as high as R10,000 per child. Those set at former white schools are relatively high and this places them well out of reach of poor parents. To take just one example across the four schools from which I interviewed girls the fees at the formerly white school were R10,000 per year, those at the African school R100.00 per year. Despite a school-fee exemption policy, schools are not prevented from exercising other selection criteria should they choose. There is therefore, in effect a two-tier public education system, notwithstanding the government's increased spending on the poor sectors of the system and reducing its allocation of resources to more privileged sectors (Taylor, *et al*, 2003). At one end of the scale, well resourced former white schools (effective well trained teachers, buildings, furniture, equipment, libraries, manicured playing fields and so on) as a result of apartheid funding are enclaves of an established and aspirant multi-racial middle class. At the other end of the scale we find poor African (black) township schools seriously lacking material and human resources. In between are the former schools allocated to children designated as 'mixed race' (Coloured) or 'Indian', which vary in the quality of their resources, not as bad as township schools, not as well resourced as former white schools. In general, the legacy of gross inequalities thus continues and the breakdown of learning cultures in many urban African schools continues to bedevil educational reform. Christie (1998) describes schools for urban African working class children as characterized by schools in disrepair, poor examination results, low morale, a breakdown of head teacher and teacher authority; irregular attendance by students and often teachers; violence in and around schools; and, rape, drugs and gangsterism at schools.

Particularly worrying for the education of girls is the violence and harassment of female pupils by their male peers and by teachers, which continues to be endemic in large numbers of black schools (Unterhalter 2003). Moreover, a low intensity kind of harassment is pervasive in the social culture and infects gender relations in schools, such that girls are affected across the spectrum of race and social class, with some dropping out of school to escape the climate of abuse and others sufficiently affected that it diminishes their learning opportunities (see Human Rights Watch, 2001). Overall,

statistical data for the years 2000-2002 indicate that 69% of children traumatised by sexual abuse were girls aged 10 to 14 years (*Weekend Argus*, 9 August 2003). To take one example, during the period I was interviewing girls in Cape Town, three Year 9 pupils from one of the schools in a lower middle class suburb decided to skip school. They were kidnapped by minibus taxi drivers, a vital component in the school transport business, waiting right outside the school gates and then taken on a two hour horror ride around the neighbouring areas during which one was raped and two were threatened with rape (*Cape Argus*, 12 August 2003). As Unterhalter convincingly argues 'the failures of management in schools with regard to providing a safe environment for education places the assumption of education simply and unproblematically enhancing capabilities in question' (2003, p.16). School, she insists, then cannot be a place of substantive freedom, nor easily a place of 'active, empowered capability'.

Furthermore, South Africa is estimated to have the largest number of people with HIV in the world and the numbers infected represent nearly one quarter of the population. Of those infected, women comprise approximately 56%, with the single largest group those aged 15-34 (see Unterhalter, 2003). Morrell *et al* (2001) have estimated that in one province in South Africa 15.64% of African girls aged 15-19 were likely to be HIV positive. Given this HIV/Aids epidemic in South Africa (Morrell *et al*, 2001), it may be that bodily health (strong, healthy bodies, see Nussbaum, Narayan and Petesch, Alkire) needs to be included at this point as a capability as well.

In 1996 the DOE did establish a Gender Equity Task Team to make recommendations on achieving gender equity (Wolpe *et al*, 1997). The DOE has committed itself to 'a gender sensitive education system that facilitates the development of a non-sexist society as envisaged in the Constitution' (DOE, 2004). Indeed, bodily integrity is specifically mentioned in one of the strategic objectives of the Tirisano education plan, adopted in 2000: 'To promote values, which inculcate respect for girls and women and recognise the right of girls and women to free choice in sexual relations' (Department of Education, 2000, quoted in Unterhalter 2003, p.16). Additionally, corporal punishment for boys and girls, once widespread in black schools, has been officially banned. This is not to say that there is not still a substantial gap between policy aspirations and policy implementation with regard to gender equity (see Chisholm, 2003). Indeed, under contextual conditions of gender injustice in South Africa and HIV/Aids, bodily integrity and bodily health becomes crucial to shaping the 'facilities for education' (Sen, 1999) and the infrastructure of educational support so that it fosters opportunities for self-realization. In other words, both capabilities are fundamental to the conditions that facilitate capability and freedom and in the case of South Africa we might argue that if they were not present as a capability education could not freely take place. Moreover by combining concerns with bodily integrity and bodily health with the core capabilities of autonomy and affiliation, the social relations in and out of school that enable the unequal treatment of girls and women would have to be addressed. Finally we need to remind ourselves that schools never stand outside of society, and we cannot therefore think about education capabilities outside of thinking about the relationship between education and society, between schools and society.

What emerges from this brief overview of education policy is that there is nothing here to contradict the four core capabilities proposed at the end of the last section of this paper. Policy which encourages full personal development, independent and critical thinking and problem solving is consistent, albeit weakly, with autonomy facilitating education. Promoting human rights, anti-discrimination, gender equity, inclusivity and

learner, centeredness are consistent with capabilities of affiliation, including elements of respect and recognition of the value of each and every child, and with emotional integrity (corporal punishment for example has been officially banned). What are introduced as new capabilities for education are firstly, those of 'bodily integrity' and 'bodily health' (Nussbaum, Narayan and Petesch, Robeyns, Alkire), given the endemic climate of violence against girls and women in and out of schools in South Africa. Secondly, there is the capability for cultural identity and recognition to be added. Thus, there is nothing from policy to lead me to remove a capability from my list, and there is also something to add, given the specificity of South African social and educational conditions.

We now have this list, but with no particular ranking or weighting:

1. Practical reason (autonomy facilitation, empowerment)
2. Knowledge. (imagination)
3. Affiliation (respect, recognition)
4. Emotional integrity
5. Cultural recognition and valuing
6. Bodily integrity
7. Bodily health
8. Play (in the case of young learners).

### **(b) Capabilities from girls' lives and voices**

I now turn to the voices and lives of 40 South African girls, black and white. Based on statistics of access and outcome, girls in South Africa are doing well. The Gross Enrolment Ratio (GER) for 2001 is used to show the level of participation in education (understood simply as attending school). In 2001 the total GER for primary and secondary school was 103%, with participation higher in the primary phase at 117% and lower in the secondary phase at 86%. The national GER for females was higher than for males for the secondary phase, but lower for the primary phase (DOE, 2003). According to the Gender Parity Index, defined as the GER for females divided by the GER for males, in 2001 the GPI primary and secondary was 1.00 indicating equal participation by girls and boys. The GPI primary was at 0.95 was lower than the GPI secondary at 1.10 which indicates 10% more girls than boys in secondary school. In the Western Cape specifically, at Grade 10 (the first year after the compulsory phase) there were 36,875 girls in school and 31,246 boys. In 2001 in all provinces more girls wrote the matric examination, but the relative pass rate of boys was slightly higher. The national matriculation rates in 2001 showed a pass rate of 60.1% by girls and 63.6% by boys. In the Western Cape the overall pass rate was 82.7% with 82% of girls passing and 83.5% of boys. Generally boys achieved better results in mathematics (51.4% compared to 42.6% for girls), physical science (71.4% compared to 65.6%) and in geography (76.3% compared to 66.2%). But in Biology (69.1% to 66.3%), Accounting (82.5% to 84.6%) and Business Economics (74.5% to 73.7%) results were similar (Department of Education, 2003). But boys are doing better overall and better, even if by a small margin in certain subjects.

These figures can do no more than sketch the broadest outline of the participation and success of girls and boys in schooling. They do not tell us about factors of class, gender and race in student achievement, nor about the experiences of girls and boys in and out of schools, nor about the success rates of different kinds of schools. They provide

important but only very preliminary information to make judgements about education capabilities. Thus the next section of this paper draws on interviews with 40 girls in four Cape Town schools in 2003 to deduce what capabilities these girls value to live the lives they choose.

Of the 40 girls (4), 5 were white, 16 African, and 19 of mixed race, reflecting the demographic make up of Cape Town and the Western Cape, with its large mixed race population. The four schools included an African school (School A) and three former white schools, two in affluent areas (Schools B and C), the third in a lower middle class suburb (School D):

***School A***

14 girls  
100% African pupils  
majority working class  
teachers 95% African

***School B (an all girls school)***

12 girls, 8 mixed race, 3 African, 1 white  
pupils 80% mixed race, 10% African, 10% white  
mostly middle class and lower middle class, small number of working class  
teachers 90% white

***School C***

4 girls, all white  
pupils 60% white, 30% mixed race, 10% African  
middle class  
teachers 90% white

***School D***

10 girls, all mixed race  
pupils 80% mixed race, 10% African, 10% white  
lower and middle class  
teachers 90% white

The girls' socio-economic background varied. Some were the daughters of professionals, some had parents who were unemployed, or working in unskilled occupations. Their homes varied from small shacks in squatter communities, to brick built two room township homes with outside bathrooms, to solid comfortable homes in middle class suburbs. They certainly had varied material backgrounds. Thus some of them had easy access to a computer at home and a room or a quiet place to study. Others shared small homes with a number of relatives and had little or no private space. One girl from School A did her school work in the bus shelter outside her cramped one room township home. The impact of these circumstances for the poor girls seemed to be moderated or not depending on the quality of schooling they were receiving. Thus the three African girls at School B, from not dissimilar backgrounds from the girls at School A were articulate, confident, apparently much better prepared to take advantage of economic opportunities after school. At the very least, they were themselves unequivocally clear that their schooling was making a difference in their lives, compared to the opportunities for their peers at less well off schools. The complications of history and the legacy of apartheid education meant these girls were absolutely clear that they would rather be at School B than at a township school, and this in turn is a choice shaped by the legacy of unequal education. This school, and this education is seen to generate more opportunities and more autonomy, than disadvantages:

I think what makes me really happy is being here at school, that's its 'a white' school, although it is full of coloureds and blacks it still gives me the feeling that I go to a white school where there are many opportunities and if I want to do something many doors are opened, like the guidance teacher to guide us. Like the [township] school my cousin goes to, they don't have guidance teachers, they don't have computer rooms, so they wouldn't know, like a child doesn't know what she wants to be. Ok she might know what she wants but no-one tells her the right direction and guides her. (Zola)

In interviewing the 40 girls it was clear that they valued many different dimensions of wellbeing and held diverse views of what for them was the good life, shaped socially and by individual circumstances. All of them, however, valued their families, whose support for their education was important. They all valued friendships in and out of school, particularly with girls to whom they confide 'secrets' and have close emotional bonds but also with boys, who provide access to how boys see the world. They varied in the importance they attached to religion and spiritual practice, to the careers they hoped to pursue, to their valuing of material wealth, their desire to engage in public service, their desire to marry or not, their involvement in aesthetic activities, their love of nature and animals, their interest in fashion, and their desire to have 'fun'. Many of them clearly valued having strong healthy bodies and participated actively in varied sporting activities (netball, hockey, swimming, surfing) either at school if the opportunities existed, or outside of school if they did not. Some pursued musical, dance or drama interests and derived great creative, imaginative and emotional pleasure from these. This diversity of views then supports the education capability of practical reason and an autonomy facilitating education, which contains choices for diverse ways of life.

Furthermore, these also valued independence, and hence their growing autonomy. As one said, 'I like my independence, which I really want to have' (Megan); Pearl who said 'I want to know here I'm going', or Zurina who commented, 'I want to be independent...do your own thing, like for freedom'. They talked of trying to make their own minds up about life choices, for example, 'I think that a lot of us, or just teenagers in general, don't know who they are, they're influenced by a lot of things around them. I, on the other hand, I try not to be too influenced by friends' (Zubeida). Education plays a key role, 'I have to learn so that I can work and support myself', said Lumka, while Yasmina said 'the main thing of going to school is so that you can learn and go study [further] one day'. For all these girls education holds out the promise of an independent life. For the African girls at School A, in particular, it offered independence from male partners, or the choice not to marry. Tozi, for example said that what was important to her was that 'we are free to do what we really want, to be something you want to be because there is not anyone who is going to force you...in these days if I don't want to be married, I will stop and say I don't want to, so I have the right to say I don't want to do this, I'm going to do this, according to my own needs and wants'. A number of the African girls said they were not willing to do all the domestic labour for a husband 'who has two arms, two legs, two eyes, a mouth and everything' (Nombulelo)

But for all of these girls this independence is compromised by the sexual harassment of girls, predominantly outside school, but for some inside school as well. They do not go out alone at night, and they need to be careful about walking alone in isolated places even during the day. This severely restricts their freedom of movement and leaves them dependent on parents or male friends. While none of the four schools was characterised by the violence endemic in many South African schools, three of them were nonetheless in some degree marked by a low intensity pervasive harassment of inappropriate touching and disrespectful behaviour ('touching bums', 'touching your waist or your face', 'making odd comments', 'suggestive and rude things'). None of the girls I spoke to

found this acceptable, although they did vary in their confidence in dealing with such behaviour. As Sibongile said, 'a boy must talk to a girl nicely and treat her as a human being'. At the all girls school, the girls welcomed the opportunity to learn away from boys because said Zola 'I feel comfortable among girls' while Lillian added that the all girls school was an easier environment 'now that we growing up'. African girls at School B and School A who had friends or relatives at township schools also mentioned the continued use of corporal punishment at these schools as a reason for not wishing to go there. Indeed the girls at School A remarked on how different their school was from other similar schools. There was no sexual violence or gangsterism at the school; they felt safe while at school. The school is surrounded by a high fence, there is a locked gate and a guard at the gate monitoring who comes and goes. Overwhelmingly the girls or their parents at school A had chosen the school for two key reasons, it is safe and it has good results in the matric examination. As one of the girl said when asked why she did not attend a high school near to her home: 'It's not a good school for me, there was a boy who was shot by the gangsters so I said when I go to high school I can go there because I don't think it's safe. So my father's sister said that I should come to this school 'cos it's a quiet school' (Kholiswa). It was clear that these girls valued being safe at school; it made a difference to their learning. We might then argue confidently that the capability of bodily integrity clearly matters to them.

Of course, given the problem of adapted preferences, this is not to say that gender relations were uncomplicated. In at least one school there was a patterns of school fights in which girls at the school colluded, and which would take place during lunch breaks at the far end of the school field out of sight of teachers. These fights were nearly always between boys over girls and their control of girls, revealing the patriarchal relations in place in the school. Often girls would get involved to support particular boys, or a new and popular boy might be attacked if he was seen to be 'stealing the reputation' of other boys because 'the girls were always around him' (Pearl). On other occasions girls would fight each other physically over a boy.

In speaking about their futures, many of the girls offered articulate and considered accounts of how they hoped their futures would be, and in every case these plans were resonant with aspirations. Thus one of the girls from School C spoke about her future plans in this way: 'I want to have a knowledge of law basically, but my undergraduate degree would be politics, philosophy and economics and then I'll go on to do law degree and then I'll use that as platform to go into politics...I'm very opinionated and I want to change things, I want to help people, but on a large scale. If you're in politics or government you have the means to do things' (Helen, 9/08/04). One of her friends explained: 'I've got my future all lined up. I'm going to Stellenbosch [University] 'cos I want to go into medicine and the medical department there is just the most fascinating thing. I went to an open day and I learned how to extract DNA from wheat germ, and I thought 'wow' so I'm going to do immunology' (Megan, 9/08/04). One of the working class African girls from School A said: 'I'd like to go further..my dream is to be a business woman..I can be an accountant.. I can go to Peninsula Technikon 'cos my friend is there [MW: Why is that what you want to do?] People only see business men so I want to be a special one, to be a business woman. Women can do it and I will do it' (Thandi). From School B, Zubeida said: 'I've been through the wanting to be a marine biologist and a journalist. For a while I wanted to be journalist but my cousin's studying that and it just doesn't seem so attractive any more. I think I'll go into something like media studies but I'd prefer to go to a Technikon [polytechnic] than a University.

The girls at School A expect their futures to be significantly different from those of their mothers' generation. In all except one case these are girls whose families had made the decision and invested resources to send them to the city from small towns or villages in the Eastern Cape so that they might get a better schooling and have a better future. All except one of them had only been in Cape Town for around three years, either joining mothers or fathers already in Cape Town or going to live with close relatives. Most of their mothers had been or were domestic workers with minimal education, and their fathers unskilled or semi-skilled workers. In only one case was a parent a clerical worker. They see their futures being different, and certainly schooling is a key factor in this. Thus Thandi commented: 'In the old days, if you were a girl, then boys they can make you their wife and you will have no more education. So now we are living a new life, we feel no-one will tell us what to do, except yourself. In the old days our mothers were forced not to go to school, but to be a wife'. Tozi then added: 'I'd like to say in these days there are opportunities to do what you really like because in the past our mothers were domestic workers, there was no other kind of work they were doing. They couldn't go further at school because of money, they were poor. But in this case we have opportunities to go further, our parents try to educate us'.

What emerged from these future plans was the importance of the capability to aspire, which might be seen as a subset of practical reason, but which might also arguably stand as a, important education capability in itself. While the middle class girls not surprisingly imagined the possibility of middle class lives and professional occupations, it was noteworthy that they also hoped to give something back to society; they were acutely aware of their relative educational privileges. Thus while their career choices were not surprisingly middle class, their commitments to do good in the world, in whatever way, were aspirational in a different way. What was most striking is the way all the working class girls imagined better lives for themselves than had been possible for their parents. Appadurai (2004) for example argues strongly for the need to strengthen the capability to aspire, especially among the poor. He suggests that this capacity constitutes a resource for poor people (and women) to contest and alter the conditions of their own welfare. For girls the school should make available new aspirational possibilities. For example, Yasmina, one of the girls from School B talked about careers for women she had never thought of before, saying: 'At the Women of the World event yesterday at school, they were showing us a whole lot of women who were successful. Like there was one and she was a scientist and I've never actually met a woman that is a scientist and also a civil engineer or a chemical engineer because I've always thought that civil engineering has got to do with roads and no woman would want to do that'.

This positive orientation to the future is bound up also with voice and the expression of views about people's/girls/young women's welfare. It is to say this is what we want and this is why we want it. It is to say 'I can be this person and do this sort of job', and so fracture cycles of adapted preferences in which girls and women settle for less. It is to produce instead new possibilities. Appadurai argues for an expansion of people's aspirational maps, what we might call a thick rather than a thin capacity, a flexible horizon of aspirations:

Where these pathways do exist for the poor [girls], they are likely to be more rigid, less supple, and less strategically valuable, not because of any cognitive deficit on the part of the poor but because the capability to aspire, like any complex cultural capacity, thrives and survives on practice, repetition, exploration, conjecture and refutation. Where the opportunities for such conjecture and refutation in regard to the future are limited (and this may well be one way to define poverty), it follows that the capacity itself remains relatively undeveloped. (2004, p.69).

Thus education as a basic capability fosters this important capability of aspiration. Without the opportunities to go to school, and to complete 12 years of school, girls would find it difficult to imagine alternative futures to that of their parents, and harder still to realise those futures in their lives. In a country which for so long denied and diminished the aspirations of the majority of its population, and a country in which femaleness is still less valued than maleness, this is arguably hugely important.

Appadurai links the capacity to aspire to voice, arguing that each accelerates and nurtures the other. Where education schooling fosters voice, here understood as the capacity to debate, contest, inquire and participate critically', it simultaneously nurtures aspiration. Both of these capacities (capabilities) seem especially important in the context of schooling in South Africa. Where children might be denied a capability for voice in the home or in society, or where their aspirations might be cramped outside of school, the opportunity exists of developing these capabilities in school. As Bernstein says, 'To know whose voice is speaking is the beginning of one's own voice' (2000, p.12). Or where parents want their daughters to be educated but themselves lack the 'cultural' and 'social' capital (see Bourdieu, 1977) to enable them to know how best to support them in expanding their aspirations and their voices. Here is an example of this, taken from a report on the challenges facing youth in South Africa, and involving a discussion with six black teenage girls. They recount instances of racism in their schools (formerly white schools) but say that when they tell their parents about racism at school, they blame their daughters because they feel unable to challenge the school. Thus they ask their daughters: 'What made the teacher react in that way? You must have started the problem.' The girls say this is what they hear all the time from their parents (Mbatha, 2003, p.22). There is then a particular ethical responsibility for the school to challenge racism and exclusion, not to perpetuate it.

This is especially important for girls from poor homes, but in a sexist and paternalistic society is arguably important for all girls. It therefore seems as if there is another capability vital for education, that of voice. Sometimes this can be quite literally the ability to speak out and speak back, as Nombulelo points out, 'If you know how to talk for yourself, you can change things for yourself, but if you don't, you know I'm a black person, I don't mean to be racist or anything but if a black person talks to a white person they would hold back, be shy or something'. She then added that black people had struggled, 'for freedom, for their own voice to be heard by everybody'. Voice and agency intersect with each other. Yet we also need to bear in mind that there are different voices available to us, and the female voices as feminists have pointed out, that are accepted and encouraged are voices which are pleasing, supporting and caring. What girls also need under conditions of violence and HIV/Aids is voice to speak back, to challenge and confront. We see some of this emerging from the girls I interviewed, who are learning to stand up for themselves in school, to speak back to boys who show a lack of respect. Here is one example of one of the girls from school C talking about this issue:

We had one boy in grade eight and before I'd always thought if that ever happens to me I'm going to report it and when it did happen to me I was quite shocked and I was sort of, I don't want to talk about this. Then I thought about it and I was like 'Hang on, it's wrong they shouldn't be doing that'. And I spoke to them and it made me very unpopular with the whole group for a while. I said 'If you ever touch me again, if I ever hear that you touch any girl again, I'm going to report you, 'cos that's who I am. I give them respect, I don't do that to them, so they can just give respect to me and back off. (Gillian).

Thus girls need also to develop powerful, even angry voices.

This capability is understood not to be quite the same as practical reason/autonomy or affiliation, or knowledge or as a subset of any of these. The capabilities of voice and aspiration are something on which these other capabilities can all build. And as Appadurai suggests, we need to provide opportunities (in school) to *practise* these capabilities, that is opportunities to function. Mechanisms then need to be in place in schools to enable girls and young people to talk about their education and to make decisions. One of the schools attempted something like this by organising a 'gathering' for each year group on a regular basis at which they discussed matters relevant to their education and lives. The examples I was told about were sessions on physical health and nutrition and a session on how to organise your own study time. For the girls the benefit lay in hearing what the whole Year 10 thought, not just the views of one class. Another of the schools, while not necessarily seeking pupils views on their education, nonetheless has in place opportunities for pupils to develop organisational and leadership skills. The school has 48 different clubs and societies, all of which are organised and run by the pupils themselves. An hour long lunch break each day enables societies to meet and run events on range of things such as history, current affairs, film and so on. However, the capability of voice, one's own and hearing that of others, is also one to be exercised in class through the curriculum and pedagogy, rather than a practice of silencing and passivity.

The capability of affiliation and the capacity for friendship emerges from these girls' experiences as being much valued, including the differences among themselves: 'Yeah, we're so diverse and its wonderful' (Helen); 'We're different but we kind of relate to one another' (Nadia). Others value what they have in common as well: 'I like the fact that we're so much alike. We can delight in each other in so many ways and I can speak to her openly' (Janine). Sharing and the quality of being 'warm-hearted' is seen to be an important value in friendships, 'everything we share, everything' (Lumka); mutual support, 'She's doing everything for me when I need help and I do everything for her when she needs help' (Kholiswa); bringing out different sides of somebody, 'I'm very shy and they are the opposite of me and I like that because they bring out that part of me, when I'm around them I also talk and become lively'(Lillian); and offering good advice, 'every time I am in trouble she seems always to have the answers and very time she is in trouble, I have the answers' (Lilian). Loyalty and respect are important: 'she's a very loyal person, and she's good at keeping secrets, she always listens to me' (Miriam; 'friendship means that people 'respect me, they're there for me, they support me' (Helen). The idea of 'having the qualities of a friend' is valued in others and in themselves. From these girls voices, a further capability then emerges, that of being able to be a friend and for positive relationships with friends. We might describe this as a capability for sociality. Where this becomes educational is when we consider the reverse, where children are unable to do this in school, or are actively excluded from friendship groups. The resulting bullying destroys learning and in the cases of some children has literally destroyed their lives. We should therefore take this capability seriously as integral to education in its value to these girls.

However, there is another side to this capability for friendship. At the three co-educational schools many of the girls included friendships with boys as important to them in a different way from their friendship with girls, saying that they gained from the difference. On the other hand, except for school A at which all the pupils were African, there was limited association across ethnic and racial lines at the other three schools. Mostly this did not seem to operate as a deliberate exclusion, but girls did not necessarily

go out of their way to form friendships with those from different racial groups. Often this was a matter of language - the African students would speak amongst themselves in Xhosa and without knowledge of the language, communication outside the classrooms was difficult. Of course this underlines the importance of all South African learning an African language at school. Close friendships could also contribute negatively to the development of positive learning dispositions where girls sought out others like themselves who had no interest in their schoolwork; this in turn reinforces their mutual disaffection. At issue then is what the school might do through its pedagogical strategies and institutional culture to support the development of good groups, while still respecting the growing autonomy of these girls to make their own decisions about whom they associated with at school outside of the classroom.

I now turn briefly to look at some of the ways in which practices in schools might enhance or inhibit capabilities and positive identity formation. Enhancing practices include good teaching and supportive teachers with high expectations of their pupils:

They want us to learn so that we can be something better in our future. We can have a better future [MW: What do they do that makes you know that's what they want for you?] They give us full explanations, if there's like something we don't understand, at lunch break you can go to him or her and she will explain so that you can understand. So that shows that they [teachers] give us more respect and they want is to get an education. (Thandi).

Here two girls are talking about their enjoyment of English lessons, in this case a study of Shakespeare's *Twelfth Night*:

English is a difficult subject but it is something that I enjoy doing the different topics she gives us, even though it's a lot of work, but its things that you enjoy like drawing and answering questions and performing the play and reading the book in a different way, not just her [the teacher] reading the book and us just listening, it's interacting so that I can learn to speak in front of the class and not be so shy but also form my own opinion. (Shameema)

I'm quite a shy person, like I have to stand in front of the class and read so it builds up a bit of confidence. (Pauline)

School provides girls with access to subject knowledge which will enable them to make later career choices, or simply enjoy this knowledge as an intrinsic good. In the South African school system, pupils choose their six matriculation subjects at the end of year 8. Here are just two examples of the curriculum and knowledge opportunities, with positive identity effects, that school opens up for these girls:

I chose biology because I really enjoy it, I like learning about the plants and the human body and things like that and geography because I found it easier, it was easy to catch on, and science because I wanted to be a doctor. But not anymore but it's still a good subject to have, it opens doors for you and maths because maths is a really helpful subject. (Pauline)

I choose drama because I enjoy acting. I just love it. It's just like, you can be whoever you want to be, whenever you want to be that person' (Miriam)

The knowledge gained at school may be intrinsically valued, instrumentally valued (work), or positionally valued (a better university, expanded career options). Having this knowledge and the credentials that would not be possible without it, expands opportunities, agency and freedom.

But there is another side to school knowledge. There is the difficulty with knowledge diminishing capability, where girls construct deficit identities for themselves when they are not succeeding in a key subject, or doing as well as their friends. Thus Megan at school C commented that all her friends were finding maths 'easy', 'But then I don't

understand why I can find it so difficult, so I just thought I was dumb'. There is also the problem where pupils may have to study a subject they resent deeply, or when a subject they would very much like to study is not available, thereby constraining their 'voices'. In the particular instance cited here this issue is politically and historically shaped, demonstrating again the intersection of schools, society and history. Thus at school B two of the African girls complained about having to study Afrikaans(5). Not only did they dislike the language they felt at a disadvantage to the coloured girls who are all bilingual; they then end up being unfavourably compared in terms of their ability. Additionally, they then resented the fact that their own home language, Xhosa, was not offered as a subject at the school. In other words the school did not offer the study of an African language. Here we might argue that the capability for policy of cultural recognition is valued also by these two girls and for South African should be included as an important capability in education.

School lessons can undermine learning as well as support it. There is the boredom with the 'same teachers' who 'drown you in their words; it's horrible' (Joanne), or Zurina complaining 'some of the teachers just sit there and talk; it's so boring', which leads children to exercise their agency in ways which counter their own best interests. Thus one school (School D) starts the day with a silent reading period in very classroom. Pupils may bring their own books and can read anything other than a textbook or comics. But often the pupils just find this boring:

MW Does everybody in the school settle down quietly and read?

Pearl No we don't read

Sandra We just look at the book

Pearl I've been on the same page for a whole week so far. It sucks.

Teachers who leave classes to collapse into chaos so that little effective learning takes place do not enhance capability. The same two girls also talked about their history lessons in particular and the difficulty some teachers have in 'controlling' a class: 'I mean to be honest with you, my history class, I don't know what I'm doing because it's now near the end of the year and we've got nothing...I don't think she knows how to teach...we're already in that phase where we really don't care anymore because it's so late in the year' (Pearl). They further pointed out the gender dynamics of their classrooms in which boys end up getting more attention from teachers and from the girls as well: 'The girls behave better in class. The boys generally do get more attention because they make a noise so they get attention from us as well. Most of the time we scream at them to keep quiet' (Sandra).

Aspirations can be compromised by schools. Two of the black girls at School B felt the teachers sometimes expected too little of them just 'because we are black'. Lillian commented that teachers 'don't really expect us to do better than whites or coloureds'. She went on to tell this story:

A friend of ours, she got very little in a certain subject and when she came to a meeting with her parents the teacher said 'Well this is very good for her.' And the parents argued that, 'No, but in her previous school she did better'. The subject was Geography and so we all felt that maybe the teacher just said that because the girl was black.. [MW So why do you think some of the teachers might not expect black girls to do as well?]It's what people expect, you know, that black people are domestic workers, the security guards and so on.

Here the school and its teachers seem not to be fostering the aspirations of these girls as fully as they should, or as they do for other girls. Voice is reduced by teachers who take

unfair decisions about girls' ability, for example, to move girls from a higher to lower grade class without consulting them. Sandra recounted how she had not done well in recent half yearly maths examination so her teacher downgraded her from the higher grade to standard grade (an easier examination but not recognised for university entrance). She said that they thought she had no choice in this matter but then she heard from another pupil that this was not the case. She spoke to her teacher and asked her and explained that she really wanted to be in the higher grade. The teacher then agreed, but as Sandra said, 'The teachers don't say this is the reason why, they just tell you, 'you must go'.

Schools engage in practices of mis- or non-recognition other than of language. They are saturated with ritual and symbols which work to shape pupil identities and for the purposes here, we might argue, their capabilities of voice and aspiration, that is who they take themselves to be. Here is one example of this at work. At School C the four girls spoke at some length about the visible signs of recognition for success at sport or academic achievement, on the one hand a coloured scarf for those who participated in at least 75% of the first team matches in any sport, or a badge for those who achieved 75% in their grades, what they called a 'boff badge'. But the school it seems values sporting achievement above all else, or certainly makes more of it publicly, leaving those girls who do not achieve at sport feeling diminished in their own considerable academic achievements for which they want public recognition. This is the story they told:

There is this badge that nobody knew about, it's a merit badge for getting an A aggregate in grade 10. We did 't know about it; I got so upset because there's not nay chance I can get a coloured scarf or a certificate for honours in sports. I got an 89% aggregate and I got nothing and I felt I'd worked really hard and I got nothing for it... There should be some publicity, anyone who gets over 80% can get a merit badge, 'Well done, we appreciate you'. (Gillian 16/8)

At issue is that even high achieving middle class girls can feel diminished, and while one might argue that this is a lesser problem than those of girls struggling along in poorly resourced schools, the broader point still holds that practices in schools shape pupil identities, and they do this in ways which foster and constrain capabilities, agency and freedom. This can work in complicated ways, for example School B appears to promote a very particular version of femininity on the one hand, while on the other encouraging girls to think about careers which might not be obviously female, to have confidence in themselves as young women, and so on. The girls at school B felt that the school expected them to be 'ladylike', quiet, polite, neat, and so on. This point is made merely to emphasise again the contradictions of school life and experiences.

Being disrespected because of skin colour is fiercely criticised: 'That makes me really really mad because black and white people, I don't see what is the big difference, because we are all the same. But people, you will see people treating other people very, very badly' (Nombulelo). Compassion and a kind of critical attention to inequalities is valued as part of this broader capability of affiliation as Nombulelo's words shows, and this story from Pearl, as she talks about homeless people who live in her neighbourhood. The girls had been asked to take photographs of their lives before the interviews and to seek permission before doing so:

I wanted to get a photograph of the vagrants in our area because you see them everywhere... When I asked their permission, they were like, 'Please my darling take a photo of us', and they were smiling. I was sort of afraid to ask them. You don't really know what they're going to do but I asked them and they agreed. I'm a very deep person, I'm very sensitive as well. I feel for things like this... You know what I think? In our

society they're never going to get it right. These people are never going to work, they're never going to get what they want in their lives because there's not that many jobs for them.

What then emerges is that these girls value learning and the opportunities education will open up for them. They seem to value the knowledge they gain both from the subjects they enjoy and those they find harder or less interesting. They appear to value having their own voices and cultures acknowledged and recognised, and find teacher support, care and appropriate expectations affirming and confidence-building. They value their friendships in school and repudiate their bodily boundaries being transgressed. It also needs saying, however, that important though education and school is for these girls it is not the only source of their identities and their experiences of family and friends will also have significant shaping effects which might reinforce or contradict the messages from the school. Here sociological theories, such as the work of Bourdieu would be useful to explore in more depth how girls come to construct their identities and their agency across the fields of family, friends and school (see for example, McNay, 2000).

Where then does this leave us with regard to the developing preliminary list of capabilities? There seems no good argument for removing any capabilities from the list so far, and a good argument for adding specific capabilities of sociality, voice and aspiration. With regard to sociality we might wish to separate out two separate capabilities. The first is the capability to be a friend, given the value placed on friendships in school. The second is the capability for being able to form part of a group, both for friendship but also for participation in learning. I make this separation given the evidence from research for the effectiveness of co-operative learning and for young people in school learning both with and from their peers (see for example Flanagan and Sayed, 1994). This in turn raises the matter of the institutional conditions which support the formation of constructive and positive groups.

Aspiration, voice, being a friend, being able to be part of group, all intersect with practical reason, affiliation, knowledge, cultural recognition, and bodily integrity and health and reinforce and promote each other. I argue that for this education list, to reduce the development of any one capability is to reduce the development of also of others. The capability for leisure has not been included here. Although the girls enjoy and value a variety of activities they are not dependent on the school to do this. Two of the schools offer a range of activities, two offer very little or nothing. This seems to make little if any difference to the girls' participation in such extra-mural activities.

All the capabilities on my provisional list are valuable for girls' education, and all point to essential features of 'education' in South Africa. If there were not present in South African schools, then we would have cause to question the quality of education and wellbeing in those schools. Thus we now we have this draft list but with no attempt at a weighting of the various capabilities:

1. Practical reason (autonomy)
2. Knowledge (imagination)
3. Affiliation (respect, recognition, compassion)
4. The capability to be a friend
5. The capability to participate in a group for friendship and for learning
6. Aspiration
7. Voice and different kinds of voices, including strong voices
8. Bodily integrity and bodily health
9. Emotional integrity

Perhaps we might try to decide which of these are education capabilities and which are educational conditions capabilities. Or put another way, which would be 'ideal education capabilities', and which 'non-ideal'. There is consensus from the various sources of information that facilitating 'thick' *autonomy* is a core education capability. This includes such matters as the development of critical and reflective thinking, for active learning, and supports the idea of knowledge as a process of critical and creative inquiry, but goes beyond this to include the ability to make informed choices about the good life. *Knowledge* emerges as a core capability for education, even though for some writers this is subsumed with or under other capabilities. If education is anything it must be the getting of knowledge, including literacy and numeracy but also literary, mathematical and scientific understanding. It then includes also the capacity for imagination and creativity. Moreover, the capability of knowledge reminds us to pay attention to curriculum and the relationships of power, knowledge and difference. This brings us to how knowledge is acquired making *affiliation* a core capability in its concern for relationships, respect, recognition and through relationships for participation with others in learning and school life. Taken together these three 'ideal' education capabilities foster agency, and education as a core capability in human development.

If the three core capabilities were being developed it would follow that friendship, participation in learning, respect for girls and women, and freedom from fear in learning would be in place. However, in some contexts, and South Africa is one of these, we need to make explicit the less than ideal educational conditions which exist and hence name these problems by insisting on further capabilities for an education list. I would then suggest that the remaining capabilities for voice, aspiration, friendship, bodily integrity and bodily health, and emotional integrity might be seen as contextual education capabilities. Of these voice, aspiration and bodily integrity are very important. If education is a process of silencing voices, diminishing what people imagine for themselves in the future, and subjecting girls to threat and harassment, then we need to ask seriously question whether this is education development and monitoring.

Finally, this list now needs further public discussion with a large number of girls, with teachers and with other researchers and with policy makers. It is provisional only at this stage.

## V Three issues

Three issues remain to be briefly addressed.

### (i) Voice

There is the difficulty of how we evaluate people's subjective accounts of their lives as a matter of practice and of research methodology. On the one hand, the idea of participation is intrinsic to the capability approach – listening to what people have to say and involving all those affected in dialogue and debate. On the other hand there are real difficulties in the face of adapted preferences of knowing what it is that diverse people value, for example girls and women accepting subjugated roles in society. Thus girls may not raise their exclusion from studying certain subjects or pursuing certain careers as an issue for them. Here the concept of voice as a practice and research methodology is crucial. There are different ways in which this idea of voice has been taken up. For

example, Alkire (2002) adopts what might be described as a *mediated approach* to women's voice grounded in what are seen to be valued capabilities by the researchers, and the mediation of these ideas with a group of participants in a project being evaluated by a trained facilitator. It is crucial that the facilitator, usually an 'insider' of some kind, enables a process for women to respond and raise their own ideas. There is then a dialogue between the researcher's concerns and those of the women. Alkire certainly raises the difficulty of an attack on the assumption that poor people can articulate and analyse their poverty. Nonetheless she sets out to demonstrate in her own research that 'some of the key information on agency and functionings, without which capability assessment is impossible, can be obtained by simple facilitation, and assessed by the same communities' (2002, p.200).

In the research by Narayan and Petesch (2002) the voices of the poor are seen as vital to the research. Here we might say there is concept of *voice as numbers*; the fact that 60,000 poor people in 50 countries were interviewed allows for a weighty accumulation of patterns of incontrovertible responses. Voice builds on voice until the weight of the evidence which emerges cannot be dismissed.

A third approach to voice is one grounded in a *critical reflexivity*, that is an appreciation of power relations and the recognition that voices do not speak for themselves. Kuhn (1995) explains that our experiences constitute a key category of everyday knowledge and structure our lives in important ways, they make us what we are — different from everyone else. But our voices are mediated socially and structurally by the time, place and conditions of their speaking. Moreover, experience (and personal testimony) is more than a valorization of the individual psyche. What we take to be 'experience' is a process shaped by the relation of the inside (the self) and the outside (the social) so that 'what we comprehend as subjective are in fact material, economic and interpersonal social and historical relations' (Teresa de Lauretis, cited in Kauffman, 1997, p.1161). Thus structures of schooling may work to silence or subdue some voices (see Arnot and Reay, 2004).

The fourth approach is an *aspirational voice*, situated in a culture of aspiration, as explicated by Appadurai (2004). He reminds us that when an outside agent (for example a researcher) enters a situation where the poor are a major concern 'he or should look closely at those rituals through which consensus is produced both among poor communities and between them and the more powerful' (2004, p.83). But, as human beings we have agency; we construct meanings about our lives. Appadurai therefore argues that all efforts to cultivate voice among the poor in debating policy or projects 'should be encouraged rather than suppressed or ignored'. 'It is', he says, 'through the exercise of voice that the sinews of aspiration as a cultural capacity are built and strengthened, and conversely, it is through exercising the capacity to aspire that the exercise of voice by the poor will be extended' (2004, p.83).

At issue is the need for careful attention to how we produce our stories of capability development: who speaks and who is spoken; who represents and who is represented.

## **(ii) Functioning or capability in education**

The second is the issue of whether in education we ought to focus as much on achieved functioning as on capabilities. As Nussbaum (2000, p.91) has pointed out with respect to children, we might need to promote a relevant capability 'by requiring the functioning that nourishes it'. In other words functioning is required for further development of a

budding capability. She gives the example of requiring children, especially girls, to spend time in play, story-telling and art activities as a way to promote the general capability of 'play' for girls and the women they will become. In other words they need to do it (function) in order to develop the mature capability. Nussbaum suggests that 'the more crucial a function is to attaining and maintaining other capabilities, the more entitled we may be to promote actual functioning in some cases, within limits set by an appropriate respect for citizen's choices' (2000, p.92) Thus, with regard to the education capability of practical reason/autonomy we might argue that it is crucial for children to practise critical thinking and reflection, and for us to evaluate their functioning in these areas in order that they might develop the capability of practical reason/autonomy. We might further argue with regard to life in schools that we need to enable children's functioning as respectful and compassionate young persons so that they might develop the mature capability of affiliation. We need information on what knowledge children have acquired and what analytical and conceptual tools (their functioning) so that we might be assured that they are developing the capability of knowledge. We need to provide children and young people with opportunities for their voices to actually function, for their aspirations to be tested, for their emotions and imaginations to function. In short, we need information to tell or show us that children are engaging in actions and activities that show they are functioning as, and becoming 'educated' persons so that they will have this as a mature capability in adulthood.

In turning towards children's functionings, we need information to tell us when an absence of functioning means absence of capability. This is a matter of ethical concern. For example if a boy harasses or assaults a girl at school we can argue that he lacks the capability of affiliation, and being assaulted the girl lacks the opportunity for the capability of bodily integrity. There is then a somewhat complicated articulation of capability, functioning, action and direct information for judgements in school about how well we are doing educationally. At issue, as Nussbaum points out, is when 'requiring functioning is the only way to ensure the presence of a capability' (2000, p.93). Robeyns (2002) adds a further dimension to the argument when she considers group inequalities (in this case gender inequalities). She argues that 'inequality in achieved functioning implies inequality in capabilities, except if one can give a plausible reason why one group would systematically chose different functionings from the same capability set' (p.22). This in turn would open out the effects of social structures on educational opportunities – if most working class children were doing badly in acquiring high order analytical knowledge, we might wish to raise questions about the effects of social class on children's functioning achievements.

### **(iii) Measurement**

The final issue is how we measure capability. This is likely to be complicated given the need for a multi-dimensional mapping of intersecting factors. Alkire (2002) offers a detailed methodology in her three case studies which might be useful for others to build from in the evaluation of small-scale projects. The European Group of Research on Equity of the Educational Systems (Schuller, 2003) has developed a set of 29 indicators devised with a view to judging the fairness of European educational systems. They propose four broad areas of: context of inequalities of education, inequalities in the education process, inequalities in education, and social and political effects of inequalities in education. Each broad theme is broken down into a number of indicators. For example, the theme of 'Inequality in the education process' has the following indicators:

*Quantity of education received*

1.1 Inequalities in schooling expectancy

1.2 Inequalities in education spending

2. *Quality of education received*

2.1 Perception of support from teachers according to 15 year old students

2.2 Perception of disciplinary climate according to 15 year old students

2.3 Segregation

2.4 Students' perception of being treated fairly. (Schuller, 2003, p.20)

They further distinguish between discrepancies between individuals, inequalities between groups and the notion of a threshold, ideas which might usefully be taken up in considering how to measure education capabilities. Finally, Unterhalter and Brighouse (2003) attempt a preliminary model of measurement which turns on three related conceptualisations of education; the instrumental value of education, the intrinsic value of education, and the positional value of education. It may be that these three fields, mapped over wellbeing freedom and agency freedom, together with agreed education capabilities might take us forward. As the idea stands there seems to be gap between how one proceeds from the central features of agency freedom and agency wellbeing through the axes of intrinsic, extrinsic and positional values of education.

## Concluding thoughts

In education, we also need to think about which additional theories we might draw on to further our understanding of learning, identity formation and the construction of adapted preferences. I have already noted that Bernstein's work on the pedagogical relay of relations of power and control might usefully enter into a rich conversation with the capability approach, without adherents of either approach needing to abandon their preferred frames of analysis and interpretation. I would also argue that the sociology of Bourdieu offers a potentially rich addition to the capability approach in its explication of the formation of subjectivity, structures and 'choice'.

We might also want to see how to use the capability approach not only to measure what has already taken place but also as a means to produce change. How might using the capability approach lead to change and improvement in education both prospectively and retrospectively? How might the capability approach produce as well as evaluate education policy?

To conclude, the issue for those of working in education is that schools, colleges and universities contribute, for many people quite substantially, to the formation of their capabilities to function. Ideally educational organisations ought to equip people with the capabilities to pursue opportunities they value. How valued and valuable opportunities and capabilities are distributed through formal education and to whom, and how this maps over structures of race, gender, class able-bodiedness, religion, and so on is a matter of social justice in education.

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## Notes

1. The focus on this paper is not on the methodology of the research; this in itself merits a separate paper on issues of positionality, reflexivity and conditions of trustworthy knowledge production. Briefly, however, volunteers year ten girls from four different schools in Cape Town were interviewed over a three week period in August 2003. The schools were selected for their different histories and socio-economic intake. Access was negotiated by writing to the Western Cape Education Department and thence to the head teacher of each school in the first instance, and then producing an explanatory leaflet for year 10 schools to enable them to decide whether or not they wished to participate. Before the interviews a meeting was held with the group of volunteers at each school to explain the project in person. Interviews were conducted with pairs of girls, with each interview lasting around one and a half hours. Prior to the interview each pair of girls were given a disposable camera to take a set of photographs of their lives in and out of school. These were developed and formed the basis of the discussions with the researcher. In analysing the data across all the life narratives, the complexity of lives is clear and interpretation must then deal with what Ball et al (2000, p.16) have described as the 'obdurate diversity' of the data.
2. For example, see John Dewey (1916) *Democracy and Education*, and Paolo Freire (1972) *Pedagogy of the Oppressed*. Both take up the role of education in contributing to democratic freedoms and a democratic society, and both point to the importance of learners experiencing democratic processes in their own education in order to foster understanding of how democracy works. In Sen's terms, they are concerned that learners develop the capability for democratic citizenship and democratic life.
3. For accounts of pre apartheid education see Kallaway, 1984 and 2002. For post apartheid developments the special issue of the *Cambridge Journal of Education*, Vol 28, no 3, 1998, Morrow and King 1998, Kallaway et al 1997 and Taylor et al 2003.
4. All the girls' names are pseudonyms.
5. It was the requirement that African children study through the medium of the Afrikaans language, the 'language of the oppressor, that ignited long simmering frustrations with bantu education on 16 June 1976 in Soweto, a turning point in the history of struggles against apartheid in South Africa..

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