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The Centrality of Participant Voice in Illuminating the Gender Regime in Education Research Using a Human Capabilities Analysis

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The centrality of participant voice in illuminating the gender regime in education research using a human capabilities analysis
La centralité de la voix du participant pour éclairer le régime de genre dans la recherche en éducation en utilisant une analyse des capacités humaines

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Abstract

The human capabilities approach distinguishes between capabilities (a person's ability to choose what she wants to do/be) and functionings (actually doing/being what she wants). When used to analyze gender equality in education, it draws attention to the nature of education and the extent to which it is equally empowering for girls and boys. This research synthesis examines the use of the human capabilities approach as an analytical framework for gender and education research. The approach's emphasis on participant voice as a means of articulating what is valued in education highlights contradictions and similarities within a given community and attends to the way that the gender regime of the school characterizes the educational experience. This is particularly meaningful in relation to the views of student participants including children, whose descriptions of their educational values, goals and experiences are critical in understanding the daily operations and experiences of gender regimes in schools.

Résumé

L'approche par les capacités humaines fait la distinction entre les capacités (l'habilité d'une personne à choisir ce qu'elle veut faire/être) et les fonctionnements (actuellement faire/être ce qu'elle veut). Lorsqu'elle est utilisée pour analyser l'égalité des sexes en éducation, cette approche attire l'attention sur la nature de l'éducation et l'étendue sur laquelle elle favorise l'autonomisation autant pour les filles que pour les garçons. Cette synthèse de recherche examine l'utilisation de l'approche par les capacités humaines en tant que cadre analytique pour la recherche sur le genre et l'éducation. L'emphase que cette approche met sur la voix du participant comme étant un moyen d'articuler ce qui est valorisé en éducation souligne les contradictions et similarités au sein d'une communauté donnée, et s'occupe de la manière dont le régime de genre de l'école caractérise l'expérience éducative. Ceci est particulièrement significatif en ce qui concerne les points de vue des étudiant-participants, y compris les enfants, dont les descriptions de leurs valeurs, buts et expériences éducatifs sont essentiels pour comprendre les opérations et expériences quotidiennes des régimes de genre dans les écoles.

Keywords: human capabilities, gender regime, education, analytical framework, methodology, participant voice

Introduction

Originating in the work of Amartya Sen and Martha Nussbaum, the capabilities approach is characterized by its distinction between capabilities (a person's ability to choose what she wants to do) and functionings (actually doing what she wants). The concept of capabilities revolutionizes international development by focusing on an individual's ability to achieve what she or he values doing, as opposed to externally identified measurements of progress. It is particularly useful for analyses of gender equality in education by facilitating necessary critical attention to the gendered nature of education and the extent to which it is equally empowering for girls and boys. This paper examines the application of the human capabilities approach as an analytical framework for research on gender and education to date. The approach's usefulness is ultimately dependent on the extent to which the principles of the approach that emphasize individuals' opinions about their own agency and well-being capabilities are reflected in the researcher's methodology. By making participant

voice a central component of analysis in relation to what is valued in education, the researcher can provide a rich gender-responsive examination of education research that highlights contradictions and similarities within a given community, draws attention to the way that the gender regime of the school characterizes the educational experience, and is grounded in local context. The term 'participant voice' is used to encompass methods that emphasize research participants' descriptions of their life experiences and what they value, as opposed to evaluations of the degree to which their experiences and achievements reach a standard established by a group of typically Eurocentric individuals and/or organizations for universal application. The role of participant voice in capabilities research is particularly meaningful in relation to the views of student participants including children, whose descriptions of their own educational values, goals and experiences can be critical in understanding the daily operations and experiences of gender regimes in schools.

Gender equality and inequality in education:
Discussions of gender inequality in education often focus on low rates of female enrolment, as unequal access to education remains a major challenge internationally. But while improving gender parity remains important, increasingly there is recognition that achieving gender parity or universal enrolment is insufficient to guarantee gender equality in education (Aikman & Unterhalter, 2005; Aikman, Halai & Rubagiza, 2011; Chisamya, DeJaeghere, Kendall & Khanim, 2012). Subrahmanian (2005) defines gender equality as equality of treatment and opportunity, with specific emphasis on the fundamental freedoms and choices available to women and men. These freedoms and choices are significantly shaped by economic and social context, which influence expectations and opportunities for girls, boys, women and men. This is true within broad community environments as well as specific institutions such as schools. School environments are shaped by social norms including gender norms (Massey, 1994). Through everyday routines and practices, these norms are internalized by students as natural and normal (Tyner, 2012). A school is therefore unlikely to independently challenge oppressive gender norms and constructions and more likely to reproduce and strengthen them if it does not prioritize the promotion of gender equality within the explicit and hidden curriculum (Leach & Humphreys, 2007; Stromquist, 2006).[1]

Despite dramatic increases in primary school enrolment in many regions over the past two decades, enrolment increases are often not accompanied by improvements in attendance, retention, completion, learning and equality (Aikman, Halai, & Rubagiza 2011; Barrett, 2011; Department for International Development [DFID], 2010). A holistic conception of quality education considers the many dimensions that characterize the educational process. The curriculum has to be understood as encompassing the process of curriculum development and instruction that includes the ideology influencing the choice of ideas, documents and materials taught and provides space to consider gender equality as a fundamental part of education quality (Aikman, Unterhalter, & Challender, 2005). A focus on gender norms is essential to challenge gender inequality in education, as there are many internal school factors that impact student achievement and reproduce and strengthen sources of discrimination. As Stromquist (2001) observed, "the fundamental educational problem for women, whether poor or rich, concerns the unquestioned, non-problematised gender-based nature of schooling" (p. 53). By ignoring oppressive gender norms in education, these norms are reproduced and given credibility and influence. Gender inequality characterizes education to some degree everywhere in the world; this paper focuses on low-income countries as the capabilities approach has

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[1] Explicit curriculum is the intentional recommended, written, taught and operational transmission of knowledge, whereas the hidden curriculum is transmitted knowledge that generally is not a product of conscious intention (Glatthorn, et al. 2012).

most frequently been applied in these contexts, while recognizing that enormous diversity exists in gender expectations across the Global South.[2]

The gender regime
Gendered attitudes infuse all social institutions including schools, where they directly influence students' academic experience. The institutional practices that construct, regulate and normalise the power relations that infuse the school's daily activities are referred to as a 'gender regime' (Kessler, Ashenden, Connell & Dowsett, 1985). The gender regime is a central part of the school's hidden curriculum, through which concepts of appropriate masculinity and femininity are constructed and reinforced (Dunne, Humphreys & Leach, 2006; Stromquist, 2006). Discriminatory school environments reproduce and strengthen social inequality, as education is a key contributor to the creation and perpetuation of cultural expectations as well as self-identity formation (Bhana, Nzimakwe, & Nzimakwe, 2011; Walker, 2007). If education is to challenge the means by which girls are excluded from school and disadvantaged within it, schools' gender regimes have to be altered through fundamental changes to curricula and approaches to teaching and learning (Aikman & Unterhalter, 2007). To conceptualize gender-positive education, policy, research, assessment and advocacy should be guided by theoretical frameworks that appreciate quality education as both an entitlement and an opportunity for all children. The human capabilities approach offers such a framework.

The human capabilities approach
The human capabilities approach was established through the work of Amartya Sen and Martha Nussbaum (Nussbaum, 2000, 2006b, 2011; Nussbaum & Sen, 1993; Sen, 1999, 2005, 2011). It posits that evaluations, assessments and development efforts should be guided by a focus on the individual's capability to achieve certain functionings. Capabilities are "the alternative combinations of functionings that are feasible for [a person] to achieve" and functionings are "the various things a person may value doing or being" (Sen, 1999, p. 75). The distinction between a capability and a functioning is that between "an opportunity to achieve and actual achievement, between potential and outcome" (Walker & Unterhalter, 2007, p. 3). In considering the goals that an individual has for her life, Sen (1993) distinguishes between wellbeing and agency goals. Wellbeing goals are functionings related to an individual's welfare, such as being well-nourished, sheltered and safe, whereas agency goals are commitments to other individuals, causes or ambitions, such as becoming a concert pianist or escaping from a dictatorship (Burchdart, 2009).

The focus on capabilities and opportunities shifts the axis of analysis from externally identified measures of progress, such as GDP, human capital or human rights, toward the individual's ability to make her own decisions. It does not dictate what an individual should become, but examines whether she has the opportunity to do and be what she chooses (Nussbaum, 2000). A point of contention between Sen and Nussbaum is whether there should be a universal list of fundamental capabilities or whether capabilities lists should only be developed within a particular context. While Nussbaum (2000, 2003) has established a list of central capabilities to serve as a minimum account of social justice with which to hold governments accountable, Sen opposes the development of a universal list. Sen's opposition "arises partly from [his] difficulty in seeing how the exact list and weights would be chosen

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[2] Recognizing that terminology is highly political, the terms 'low-income' and 'Global South' are used here as descriptive categories to refer to the geographic location of the subject of analysis in the research articles examined. While these terms are flawed in the accuracy and emphasis, they are used as alternatives to other terms such as 'developing' and 'Third World' that are considered more problematic because of their implied reference to complete, static and superior 'developed/First World' countries (Baker, 2014).

without appropriate specification of the context… but also from a disinclination to accept any substantive diminution of the domain of public reasoning" (Sen, 2005, p. 157). He therefore opposes a universal list not only because of its questionable practicality and relevance, but also because of its detraction from the fundamental principle of public dialogue and debate as necessary for determining common capabilities.

Capabilities in education

Both Sen and Nussbaum consider education to be an essential asset for individuals to achieve their capabilities. Nussbaum (2011) states in her list of central capabilities that the ability to exercise sense, thought and imagination must be informed by an adequate education. Sen (1999) asserts that access to basic education is an essential determinant of what people can positively achieve.

Sen is criticized, however, for under-theorizing the nature of education and positioning it as an essentially positive service without examining the quality of education and the social norms that shape learning institutions (Unterhalter, 2003). Nussbaum's (2006a) writing about the nature of education has focused on critical thinking, citizenship and imagination without explicitly examining other elements of education quality such as gender equality. In education research, the capabilities approach has become more nuanced in relation to education as it has been applied by feminist educationalists to illuminate the education process and focus on the extent to which it either empowers students to determine and achieve a life they value or fails to act as this empowering resource. A capabilities analysis of gender equality in education examines whether the same barriers and enabling factors to education wellbeing and agency are present for boys and girls (Vaughan, 2007). This moves beyond an absence of rights violations to focus directly on the nature of education and the extent to which it enables students to make choices and achieve their goals (Subrahmanian, 2007). From this perspective, pedagogy is critical, as it must encourage the equal development of girls' and boys' ability to determine and exercise their own voices, aspirations and autonomy (Appadurai, 2004; Walker, 2007). As individual preferences and choices are informed by social and political circumstances (Nussbaum, 2000), an analysis must also consider sociocultural factors that influence individual agency. The development of an individual's values and goals in relation to social context is referred to as 'adaptive preference formation', defined by Colbourn (2011) as "the unconscious altering of our preferences in light of the options that we have available" (p. 52). Because an individual's values and ambitions have been prejudiced by past experience, the process by which social constraints and limitations have influenced the selection of desirable functionings should be an explicit part of the evaluation of human capabilities (Burchardt, 2009). While considering whether female and male students' are able to achieve their individual wellbeing and agency goals through education, an evaluation should also account for the socio-cultural gender norms and expectations that influence the student's identification of preferred functionings.

Children's agency and voice

A limitation of the capabilities approach (as articulated to date) is its treatment of children's agency. Sen claims that functionings are strongly relevant for children but that their freedom to make decisions and pursue the lives they value should be conceptualized in terms of the future rather than the present (Saito, 2003). Nussbaum similarly conceptualizes children as requiring certain functionings "as a necessary prelude to adult capability" (2011, p. 26). By emphasizing the importance of children's functioning to enhance their adult life opportunities and decision-making ability, these scholars appear to overlook the possibility of children's voice and decision-making in relation to their current lives and education. The concept of limiting children's present freedom to choose what they want to do and be

is based on the understanding that children are more concerned with short-term than long-term outcomes, and are therefore less able to judge what is best for their wellbeing than are parents or other adults (Saito, 2003). This treatment of children contradicts the principles of the capabilities approach that reject the notion of individuals as passive beneficiaries and emphasizes freedom of individual actions and decisions on (Sen, 1999). Children are in a developmental stage and their long-term critical thinking skills may be weaker than adults', but this is insufficient grounds to disregard their entitlement to a degree of agency and voice with respect to their present lives. A children's rights-based approach is more attuned to the principle that children are entitled to a degree of agency, autonomy and influence. Article 12 of the Convention on the Rights of the Child states that children should be given the right to express themselves and have their voices heard in decisions that affect them. Accordingly, while the role of adults as primary decision-makers should be respected, adults' decisions must consider the perspective of the child and accommodate children's unique and valuable understanding of their own lives and the services and support that they receive. An application of the capabilities approach in education should be complemented by this understanding of children as respected individuals and experts in their own lives. Much of the existing research on education using the capabilities approach already does so by highlighting student voices, either independently or in conjunction with stakeholders. This paper examines the utility of participant voice, particularly student and children's voices, in enabling a capabilities analysis of gender and education.

Methodology
To examine the applications of the capabilities approach as an analytical framework for gender and education research, I conducted an in-depth analysis of publications that fit the following criteria: 1) contain an explicit primary focus on education *and* gender or girls/women; 2) claim to use or consider the capabilities approach as an analytical framework, although not necessarily as the sole framework; and 3) contain analysis of empirical research, i.e., observational or experiential research using quantitative or qualitative methods.[3] I searched the ERIC research database and Google Scholar for articles published between the years 2000 and 2014 using various combinations of the following search terms: *human capabilities, gender, education, school, girls* and *women*. 21 journal articles[4] were found that fit the selection criteria.[5] Of these, 11 articles centered on research that took place in sub-Saharan Africa, 3 in the Middle East,[6] 6 in South Asia and 1 in Europe. Qualitative methodology was by far the most popular methodological approach within the selected articles. 13 articles used qualitative methods with an emphasis on individual interviews, 4 articles used a combination of qualitative and quantitative methods, 2 conducted strictly document and/or policy analysis, and 2 used only quantitative data. 6 articles were either authored or co-authored by the same person, Elaine Unterhalter, who has been a leader in using the human capabilties approach in gender and education research. I used a thematic analysis to identify emergent themes as categories of analysis (Fereday & Muir-Cochrane, 2006). In doing so, I conducted a first and second reading of all the selected articles, then undertook initial coding of the text of the articles, identifying important moments and observations

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[3] This methodology was modeled off of Quennerstedt's (2011) research synthesis on the construction of children's rights in education.

[4] The articles are listed in Table 1 at the end of the article.

[5] Several book chapters were also found that met the selection criteria, however they were ultimately excluded because they described the same data and analysis included in a selected journal article.

[6] The term 'Middle East' is used to describe the geographic area including Jordan, Occupied Palestinian Territories and Turkey. The geographic categorizations used here are considered necessary to illustrate the regional and country contexts where the capabilities approach has been applied most frequently in education and gender research to date, however it is necessary to recognize that these classifications and the term 'Middle East' in particular are infused with a colonial and Eurocentric history (Koppes, 1976).

prior to interpretation. I then compiled all initial codes and identified the overarching theme of participant voice that formed the basis of my analysis.

Findings
The dominant emergent theme of the thematic analysis is that researchers use participant voice-dominated methods and analysis as the central means of communicating the challenges of achieving human capabilities in and through education. Participant voice is particularly effective in describing the influence of the gender regime in education, especially when student voices figures prominently in both the methods and analysis. Centralizing participant voice enables researchers to articulate the ways that gender characterizes educational experiences and schools' ability to both enable and/or prevent students and other stakeholders from achieving their educational objectives. The individual and collective experiences of participants advance dialogue which depicts education as a social space characterized by gender norms and points to the necessity of a holistic understanding of education quality that urgently prioritizes gender equality beyond parity. The articles use a wide range of methods and interpretations of human capabilities theory, indicating there is no single methodology or method by which capabilities research can illuminate gender (in)equality in education, so long as participant voice (including children's voices in research about children's education) is central to the research agenda. Simply including participants' perspectives on the research subject is only one component of capabilities analysis, yet it provides a spectrum of opportunities to address other key components of the human capabilities theory. Methods that centralize participant voice interact with the researcher's analytical application of the capabilities approach in the use of key capabilities concepts including individuals' perspectives on their wellbeing and agency goals combined with considerations such as adaptive preferences and deliberative democracy. Agency, wellbeing and deliberative democracy are three key concepts within the capabilities approach that emerged as prominent analytical subthemes within the articles.

The role of participant voice is therefore examined here in relation to perspectives on wellbeing and agency and interpretations of deliberative democracy to examine how these capabilities concepts are operationalized using participant voice in gender and education research. Also considered are articles which do not draw directly upon participant voice to compare these analyses of the gender regime in education to the articles that center on participant voice in their capabilities analysis.

Perspectives on wellbeing and agency
A critical distinguishing factor within the capabilities approach is its emphasis on identifying an individual's capability to achieve what she values, an emphasis that is difficult to reflect without bringing forward the voices, opinions and self-expression of those individuals. Of the 21 articles reviewed, over half included student perspectives on their own educational experience and objectives. 9 articles contained perspectives from primary or secondary students and 2 from students in higher or vocational education. Many articles also included interviews or surveys with other stakeholders; 6 articles incorporated perspectives from primary and secondary teachers, 5 from parents and/or community members, 3 from Ministry of Education officials and 2 from NGO workers.[7] Individual and focus group interviews were used most frequently to solicit these views, but other methods included surveys and participant observation. Despite Sen's and Nussbaum's underestimation of the importance of children's voice and agency, many research projects that use a capabilities approach position children's voices as a central feature of the research methodology (Biggeri, 2007; Comim,

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[7] Several articles solicited perspectives from multiple stakeholders.

2009; Young, 2009). Reflecting on how girls living in relative poverty are better able to articulate the constraints on their capabilities than those living in absolute poverty, Unterhalter (2012a) observes that studies which emphasize children's voice should pay particular attention to adaptive preferences. While consideration of adaptive preferences should be a strong consideration in all capabilities research, Unterhalter (2006a) asserts that context is even more significant in understanding children's articulation of their desired functionings as they "have had more limited opportunities to formulate preferences" (p. 321). Another challenge (that exists when interviewing individuals of all ages but is particularly pronounced when interviewing children) is the tendency of child participants to say what they perceive the researchers want to hear to gain their approval, which may or may not be a true reflection of their experiences and perspectives (Fargas-Malet, McSherry, Larkin & Robinson, 2010; Punch, 2002). Considering these observations, it is worth noting that 5 of the 9 selected articles incorporating children's voices also include different educational stakeholders' as a mode of triangulation. The quotations and responses from research participants have shown that education is highly valued as a fundamental capability for girls and boys in almost all contexts. Despite this, many articles questioned the notion that education is an unconditional good. The articles that assumed this critical view of education pointed to schools as possible spaces for both freedom and unfreedom, particularly for girls, with the potential to expand capabilities but also the potential to constrain them.

For education to be considered empowering from a capabilities perspective, it must enhance students' wellbeing *and* agency goals. This joint focus of the capabilities approach brings forth a deeper consideration of the quality and gendered nature of education than is achieved by looking at access rates or achievement in terms of grades or completion. Numerous articles reviewed illustrate that the gendered expectations of patriarchal social structures from the broader community are replicated within the classroom. Manifestations of gender regimes in the school environment are described by Halai (2011) in the context of disadvantaged secondary schools in Pakistan:

> Teachers and curriculum materials often send gender discriminatory messages, which are implicit and could be due to teachers' lack of gender awareness. A consequence of these inherent biases is that whilst they have access to education, learners, in particular girls, do not have "well being freedom", i.e. a learning environment that takes into account their differentiated needs and provides them with conditions for optimal participation in the process of schooling. (p. 46)

While most of the secondary school teachers interviewed by Halai described boys and girls as having equal natural capacities in mathematics, the teachers considered mathematics to be useful for boys in developing careers such as engineering and architecture, while girls were expected to use arithmetic mainly in their households. Gender expectations such as these are communicated to students through both explicit and hidden curricula, reinforcing traditional social norms and expectations and affecting students' (particularly girls') wellbeing and agency freedom.

Wellbeing. Numerous articles focused on school factors that limit students' educational wellbeing. One frequently identified factor was the lack of school safety, which disproportionately affects girls. DeJaeghere and Lee (2011) describe how, in the seven villages in the Sunamgani District in Sylhet, Bangladesh where they conducted research, "More than 50% of the girls… said they did not feel they could enact their rights to be protected from abuse and violence in the community, school, or home. Girls and their parents stated that school and the way to school are not safe places…" (p. 34). Of critical importance is that these gender issues are identified by the research participants as factors impeding their educational development. This is an important distinction from other approaches in which the researcher identifies these obstacles without the initial identification of the factors from the participants themselves. When an element of education is identified as valued by the girls and

their parents, it is understood as prioritized by the participants within their social context, giving it a different meaning and relevance than if it had been solely identified by the researcher. This is illustrated in Walker's description of her female participants' responses to 'low intensity pervasive harassment' including inappropriate touching and comments: "None of the girls I spoke to found this acceptable…It was clear that these girls valued being safe at school; it made a difference to their learning" (2006, p. 176). The emphasis on the voice, values and perspectives of participants situates the analysis and recommendations within the lived realities and concerns of the research participants. The role of 'outsider' researchers conducting research in countries and communities in which they are not a member has long been problematized (Alcoff, 1992; McAreavey & Das, 2013; Mohanty, 1988). Using a capabilities analysis and participant voice focus are insufficient to account for the power and privilege structures that accompany researcher positionality and identity, particularly among researchers of European ancestry born and educated in high-income countries. Researchers have to independently and collectively assess the impact of their research practices and the net benefit or cost of their involvement in the research community to provide an ethical justification for each project. But for those that seek an empowering research framework, a prioritization of participant voice and the identification of capabilities and value sets by research participants can begin a process of acknowledging and leveraging voices of individuals whose views are typically excluded and disregarded from education systems at local, national and global levels. This process must form part of a larger methodology centered on situated ethics and responsible research in post- and neo-colonial contexts (Robinson-Pant & Singal, 2013; Simons & Usher, 2000; Tikly & Bond, 2013).

Agency. Alongside the consideration of wellbeing is a focus on the extent to which education enhances agency freedom. While wellbeing goals relate to a person's current state of being, agency goals relate to the objectives and goals a person has for what she hopes to achieve (Burchardt, 2009). Agency freedom is addressed in the articles in several ways. Unterhalter, Heslop and Mamedu (2013) used quantitative surveys to depict students' prevalent ideas and concerns about schooling and what they hope to achieve from it in Northern Tanzania and Northern Nigeria. Their results indicate that teacher qualifications have the strongest effect on students' educational aspirations. A more common tactic for identifying agency goals and freedom among participants is interviewing. Through interviews, female students in articles across country and cultural contexts consistently named education as valued for enabling them to pursue enhanced economic and career opportunities. Some articles critically consider whether education is able to help girls fulfill these agency goals. In her research on the role and perceptions of girls' and women's education in two pastoralist Samburu communities in northern Kenya, Lesorogol (2008) conducted interviews with Samburu girls in and out of school and educated and non-educated Samburu women. She found that education was perceived by educated girls and women as imparting fundamental skills and knowledge, including literacy and numeracy, which were useful and set them apart from their uneducated counterparts. Lesorogol noted that education was believed to create the potential for women to gain independence from traditional Samburu marriages but that most educated women remained dependent on their husband's livestock resources and were not exercising a high degree of economic independence. She further notes that education has fostered symbolic boundaries and divisions between educated and non-educated Samburu girls and women even though it is not actually bringing significant economic opportunities to educated women. Like Lesorogol's (2008) article, most of those reviewed provide a nuanced commentary on whether education is improving students' ability to meet their agency goals or not, indicating that education is enhancing girls' and women's capabilities in some ways but is often not dramatically impacting the status quo.

Deliberative democracy. Within the capabilities approach, there is a significant emphasis on democratic and deliberative dialogue in contributing to policymaking and identifying valued functionings (DeJaeghere, 2012). Sen in particular emphasizes the importance of public reasoning as an essential element of the process of determining capabilities for a given context (2004, 2005). The approach embraces contestations, debates and diversity, recognizing that the complexity that arises from debate reflects existing complexity within a given social context. Researchers use the capabilities approach for multiple ends including identifying common values across a diversity of perspectives or illustrating how the perceptions of a certain group affect those of another within a shared space. These dynamics demonstrate a complexity of participant voice that is often not a straightforward narrative of shared views or a consensus about agency and wellbeing goals. In these instances, the authors seek to either highlight the contrasting views within the opinions and experiences of the participants or to identify their commonalities to form an essential list of values across differences, pointing to a critical idea of human capabilities theory that what is valued by one person may not be by another even within the same community. Walker (2006) follows Robeyn's (2003) multi-step process to construct a list of values that reflect the intrinsic educational agency and wellbeing values of her student participants in the South African context. In doing so, Walker analyzes policy documents and interviews to draft an initial capabilities list based within the local context. She then compares her locally situated capabilities list to other lists established by Alkire (2002), Narayan and Petesch (2002), Nussbaum, 2000, and Robeyns (2003). Through these comparisons, Walker (2006) analyzes various viewpoints to formulate a capabilities list for girls' education that is built within the South African context but also integrates broader conceptions of justice that resonate with the views expressed by her participants.

Alternatively, Sharma, Verma and Arur (2013) use the capabilities approach to highlight the existence of differing value sets associated with multiple groups in the same social community. The authors use critical discourse analysis to illustrate multiple meanings of gender equality among NGO staff in India. Their research demonstrates that, while the staff interviewed all indicate that they are committed to advancing gender equality, they have different interpretations of what gender equality means and how it is manifested. After asking participants to reflect upon the gendered nature of their organizational practices, it became clear that "both men and women could only partially imagine the other's lived experience" (p. 582). The dialogic research process brought forward overlapping but differentiated interpretations and experiences of gender equality that were present among colleagues in the same organization. Thus, in recognizing and discussing varied perspectives, the capabilities approach can be useful both for identifying commonly accepted gender norms and for drawing attention to different expectations. In order to effectively highlight contesting norms that characterize the gender regime of a school or other educational organization, the research methodology must solicit multiple perspectives and use an approach in which voices of stakeholders from a variety of social positions are included, enabling the researcher to compare and contrast the perspectives that characterize a community's diversity as well as their common ground.

Sen and Nussbaum
As previously mentioned, Sen and Nussbaum disagree over exactly how deliberative the process to identify valued functionings should be. Nussbaum has identified ten core capabilities that she asserts should be adapted to a specific cultural context but are universally relevant (2000, 2003, 2006b, 2011). Sen insists that the process of identifying core capabilities must involve democratic debate within a given context, in recognition of the need for continued public reasoning (1999, 2004, 2005).

Given their prominent role in developing the approach, both Nussbaum and Sen have had a strong influence on all capabilities theorists, and many scholarly articles clearly draw from both their perspectives (e.g. Manion & Menashy, 2013; Unterhalter, 2009, 2012b). However, some authors associate more directly with a specific version of the capabilities approach. Seven of the articles examined explicitly draw from Sen's version of the approach and two draw explicitly from Nussbaum's.

Much of the research drawing specifically from Sen is strongly rooted in the voices of participants, the identification of what they value and the way that the social context influences those values. For example, Warrington and Kiragu (2012) interview a specific population of girls who have succeeded academically 'against the odds' to identify their educational goals and limitations. Through individual interviews, the authors identify three levels of 'unfreedom' faced by girls as well as the valued functionings the participants describe within education. While operating on the premise of education as a basic fundamental capability, the education capabilities that are prioritized by girls, such as being self-reliant, focused on work while at school, being attentive in class and studying as hard as possible, arise directly from their voices and discussions with the researcher, without referencing externally identified value sets established by an individual or group of people entirely disconnected from their local context. Articles that draw more explicitly on Nussbaum may reference her list in considering the extent to which participants' capabilities are realized. For example, in conducting an analysis of the evolving experience of being a Western Turkish female teacher, Cin and Walker (2013) draw upon Nussbaum's (2000) list of core capabilities as a framework for analyzing the extent to which these capabilities are facilitated for Turkish teachers across three generations. The researchers categorize Nussbaum's capabilities list into five dimensions and then focus on two (physical and social capabilities) using in-depth interviews to construct biographical narratives of fifteen female teachers that elaborates on the social inequalities that characterize these educators' experiences as well as the agency they exercise in their lives and their teaching. The voices and perceptions of the participants remain highly valued, but the difference is that they are situated within Nussbaum's list of core capabilities, instead of the capabilities that the researchers identify strictly based on their emergence from the testimonies of participants.

A middle ground is prescribed by Robeyns (2003), who agrees with Sen (2004) that each application of the capabilities approach requires its own list that relies on democratic and deliberative procedures for its development. She establishes the following criteria for the development of a capabilities list with political legitimacy within a given context: explicit formulation, methodological justification, sensitivity to context, different levels of generality, and exhaustion and non-reduction. Walker (2006) operationalizes this process, following Robeyns' five steps by considering the capability approach and its relevance for education in light of post-1994 South African education policies and prominent gender norms in South African schools and society. She situates the list in the context and experiences of South African girls through interviews with 40 black and white South African adolescent girls from mixed socioeconomic backgrounds, before comparing her initial capability list to others', as previously described. Walker's (2006) list develops at each stage, eventually reaching the following fundamental capabilities for gender equitable education in South Africa: autonomy, knowledge, social relations, respect and recognition, aspiration, voice, bodily integrity and bodily health, and emotional integrity and emotions. Her final step is to debate the list with others, partly through the article's publication and entry into the public domain. Walker's process and subsequent list illustrates a method for framing education quality and gender equality with students' capabilities at its centre. While there are significant debates as to the merits of these

various approaches, their co-existence demonstrates the democratic dialogue that Sen espouses, illustrating how friction and contestation can advance development, in this case within the theory.

Without Participant Voice
The vast majority of the articles examined draw directly upon participant voice using individual or focus group interview data, sometimes in combination with survey data or participant observation and sometimes independently. A few of the articles did not contain a focus on participant voice and perspective, and are examined here to consider the extent to which they remain able to reflect the principles of the approach, which should be reflected in the research methodology as well as the analysis. The author must clearly explain the various stakeholders consulted, what they were asked to give their opinions on and how they were consulted, efforts to include a range of stakeholders, the extent to which the views reported were representative of the population, and the checks in place to verify the accuracy of the researcher's interpretation of the data. Failure to reflect these principles results in an omission of participant voice even if they were consulted, as with Unni's (2009) article about education in India, a quantitative study in which the participants selected and the method of consultation is unclear. The author identifies that many factors may contribute to gender inequality in education, but chooses to focus on religion and caste as constricting factors without explaining whether this choice is situated within the values or experiences of participants. He borrows data from numerous national and sub-national government censuses without explaining their methodology or providing details as to who was consulted or how. By combining statistics on school infrastructure, pregnancy, domestic work and child labour (among others), he asserts that religion and caste limit women and girls' educational opportunities, without consulting participants about this claim. He briefly refers to a survey of parents' perspectives on education in Gurjarat, but provides no information as to the size or demographic of the participants and students' perspectives are never referred to. Consequently the only voice that comes through is the author's and the analysis is not an effective or authentic application of the capabilities approach. Without making participants' viewpoints central in both the methodology and analysis, the researcher ultimately relies upon an understanding of human capabilities that is disconnected from the values and goals of individuals in the population group being studied. For the reasons outlined in Sen's argument above, this analysis is unable to reflect the local context and individual reasoning that are central to the capabilities approach.

Human Development Reports
The Human Development Reports (HDRs) are a manifestation of the human capabilities theory but do not effectively reflect the theory's emphasis on individual perspectives and values. These annual global, regional and topical reports seek to monitor progress on human development by shifting "the focus of development economics from national income accounting to people centered policies" (Haq, 1995, as cited in Fukuda-Parr, 2003, p. 302). One of their methods of measurement is the Human Development Index (HDI), "a summary measure of average achievement in key dimensions of human development: a long and healthy life, being knowledgeable and have a decent standard of living" (United Nations Development Programme [UNDP], 2014). The HDR took Sen's capabilities theory as its conceptual framework, seeking to monitor progress on facets of individuals' lives that would expand their choices (Fukuda-Parr, 2003). It is the most widely used application of the human capabilities approach in comparative studies of education. Unfortunately, its measurements are criticized for oversimplifying and depoliticizing education and gender as well as other social systems (McGillivray, 1991; Sagar & Najam, 1998; Unterhalter 2003, 2009). HDRs were not included in the

articles examined, but the included article by Adely (2009) critiquing the 2005 *Arab Human Development Report* (ADHR) raises significant points about the HDRs that are highly relevant in this discussion of participant voice. Adely (2009) provides a critique of the capabilities approach's operationalization in the *2005* ADHR claiming that it masks regional and class differences and reinforces homogenized stereotypes. Her ethnographic research in Jordan illustrates the various motivations behind women's decisions to pursue or not pursue education and employment. The author captures many structural constraints and opportunities not considered by the AHDR's macro analysis, demonstrating the degree to which the high-level and abstract interpretation of human capabilities encompassed in the ADHR fails to convey the values and the well-being and agency goals of the people whose prosperity it attempts to describe. The HDR may have some value as a measurement of well-being and development that extends beyond GDP but remains comparable across countries, yet it is lacking in its ability to reflect the values of the populations it describes and remains a weak extension of human capabilities theory.

Policy Analysis
Two of the papers examined neither directly solicit participant voice nor disregard it. The two articles, loosely categorized as policy analyses, advocate for the empowerment of educational stakeholders' voices indirectly when considering the operationalization of the capabilities approach in educational policymaking. Manion and Menashy's (2013) article compares the human capabilities approach to human capital and human rights based approaches in a gender analysis of the World Bank's education policies and programming in the Gambia. They critique the human capital approach used by the World Bank to date and espouse instead the values of the human capabilities approach as an extension of a human rights based approach. While the authors themselves do not draw on other voices, they advocate for the inclusion of meaningful public dialogue and debate in informing the development of gender-sensitive national education policies and programs.

Unterhalter's (2003) article provides a critique of Sen's narrow assumptions of education as an unequivocal good that enhances individual freedom, illustrating the false nature of this assumption by pointing to the perpetuation of racial and gender inequality and violence in South African schools alongside the HIV/AIDS epidemic create dramatic barriers to freedom. To demonstrate that her analysis resonates with the lived experiences of South African students, Unterhalter (2003) refers to other studies that have solicited student voices on their school experiences (Human Rights Watch, 2001; Morrell et al. 2001; Thorpe, 2001). She concludes that the human capabilities approach in itself is insufficient if unaccompanied by broader social theories that lend themselves to more effective scrutiny of gender and racial inequities. These two analyses do not draw directly from participant voices themselves but are used in different ways to magnify the relevance of the human capabilities approach in education including the role of student voice. They advocate that a human capabilities approach informed by social theories of inequality can enhance education programming for vulnerable children by providing a space for public deliberation and dialogue that will enable the voices of different educational stakeholders, including children, to inform and influence the development of national education policies. Moreover they demonstrate how educational policies that ignore the social norms of gender and racial inequity that characterize education can unintentionally entrench and exacerbate these divisions. Thus, even though they themselves do not draw directly on participant voices, increasing the connectivity between policymakers, researchers, students and other educational stakeholders remains central to their arguments.

Conclusion

Over the past two decades, there has been a steady increase in the use of the human capabilities approach in international development research. As its relevance for education receives more attention, it is increasingly being used, particularly in qualitative research, to draw attention to the quality of the educational experience and the extent to which education is enabling students to succeed during and after their schooling. It has proven to be particularly useful in emphasizing the need for holistic understanding of gender equality in education that extends beyond gender parity. As the articles examined here demonstrate, the capabilities approach draws our attention to the voices of educational stakeholders, including students, and the gendered nature of their school experiences. The voices expressed indicate that, in a wide range of geographic and cultural contexts, education is highly valued and yet being in school does not mean that girls and boys will receive the same educational experience, nor that it will be empowering or liberating. It is critical for policymakers to hear these voices in order to understand that gender discrimination can persist in education after parity has been achieved, as equal numbers are often claimed as a triumph of equality instead of one of many components of gender equal education (Kabeer, 2005; Subrahmanian, 2005). Education is valued not simply as a good within itself but for the skills and opportunities it provides, which are dependent on the nature of the school and the social and economic context in which it is situated. This review of 21 articles that use or consider the capabilities approach in their analysis of gender and education indicates that there are substantial differences in the ways that researchers using the capabilities approach apply and communicate it in their research. Almost all of these approaches emphasize the centrality of gaining local opinions and perspectives, yet they do so with a large range of methods that show there are multiple means by which the capabilities approach can be used to analyze gender in education and by so doing contribute to building a more knowledgeable, empowered and gender just world. Researchers are usually unable to consult and reflect the voices of all individuals affected by a policy and must select which individuals to consult and, from that group, which voices to privilege in their writing or analysis. This inherently gives the researcher power and responsibility over the narrative and requires an ethical and critical analysis to ensure that the triangulation of methods and voices and analysis is grounded in participants' opinions as to what they want to achieve in and through education. Policy analyses and the perspectives of multiple stakeholders are useful for establishing a given education context within which to situate a capabilities analysis and, especially when working with children, it is useful to examine students' views alongside those of other educational stakeholders to appropriately and realistically situate them within the local context. But in choosing which views and perspectives to prioritize, student voices remain the most powerful testimonies of the gendered nature of education systems for its intended beneficiaries, especially when triangulated alongside multiple education stakeholders to gain a diversity of perspectives on education processes. A capabilities approach centered around participant voice enables the researcher to produce compelling critical analysis that questions the ability of schools to enable individuals to realize their capabilities within and through education and necessitates the prioritization of gender-responsive systems to make empowering education possible.

Table 1: *Articles Reviewed*

Article	Country	Methodology	Participants	Explicit Sen/Nussbaum Orientation
Adely, 2009	Jordan	Qualitative	Students (children), Teachers & Community	Both
Arends-Kuenning & Amin, 2001	Bangladesh	Qualitative	Students (children), Parents & Community	Both
Cin & Walker, 2013	Turkey	Qualitative	Teachers	Nussbaum
DeJaeghere & Lee, 2011	Bangladesh	Mixed methods	Students (children), Parents, Community, Teachers & Administrators	Sen
DeJaeghere & Wiger 2013	Bangladesh	Mixed methods	Teachers, Students (children), Parents & Community	Sen
Halai, 2011	Pakistan	Qualitative	Teachers	Sen
Hilal, 2012	Occupied Palestinian Territories	Mixed methods	Students (adults)	Not identified
Lesorogol, 2008	Kenya	Qualitative	Students (children) Parents/Community	Not identified
Manion, 2012	The Gambia	Qualitative	Government and NGO officials	Not identified
Manion & Menashy, 2013	The Gambia	Policy analysis	N/A	Both
Sharma, Verma & Arur, 2013	India	Qualitative	NGO officials	Not identified
Unni, 2009	India	Quantitative	Unclear	Sen
Unterhalter, 2003	South Africa	Policy analysis	N/A	Sen
Unterhalter, 2009	South Africa & Kenya	Qualitative (policy analysis & interviews)	Government officials	Both
Unterhalter, 2012a	South Africa, Kenya, Tanzania & Nigeria	Mixed methods	Students (children)	Not identified
Unterhalter, 2012b	Kenya & South Africa	Qualitative	Teachers	Both
Unterhalter, Heslop, & Mamedu, 2013	Tanzania & Nigeria	Quantitative	Students (children)	Not identified
Unterhalter & North, 2011	South Africa & Kenya	Qualitative	Government officials	Not identified
Walker, 2003	United Kingdom	Qualitative	Students (adults)	Nussbaum
Walker, 2006	South Africa	Qualitative	Students (children)	Sen
Warrington & Kiragu, 2012	Kenya	Qualitative	Students (children)	Sen

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