POWER, POVERTY AND INEQUALITY

IDSBulletin
Transforming Development Knowledge

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Jerker Edström leads the Gender and Sexuality cluster at the Institute of Development Studies (IDS). His 30-year career in development has focused broadly on gender and development, particularly gender and masculinities, sexual and gender-based violence, sexual and reproductive health and rights, HIV prevention and children, youth and AIDS. He has led IDS programmes, such as Gender, Power and Sexuality, funded by the Swedish International Development Cooperation Agency (Sida), and Engendering Men: Evidence on Routes to Gender Equality (EMERGE), funded by the Department for International Development (DFID). He has co-convened several international events and co-edited volumes such as *Men and Development: Politicizing Masculinities* (Zed Books, 2011) and 'Undressing Patriarchy: Men and Structural Violence' (*IDS Bulletin* 45.1, 2014). He has a long involvement with convening and teaching on IDS' MA teaching courses and modules in Gender and Development, in collaboration with the University of Sussex.

John Gaventa is Professor and Director of Research at IDS. He has written widely on issues of power and participation.

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Bruno Martorano is a postdoctoral researcher at IDS and a Research Associate at Consortium pour la recherche économique et sociale (CRES) in Dakar, Sénégal. Prior to this, Bruno worked at the United Nations Children's Fund (UNICEF) Office of Research in Florence and the University of Florence, and has held consultancies for the University of North Carolina at Chapel Hill, the United Nations Conference on Trade and Development (UNCTAD), the United

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Rosie McGee is a Research Fellow in the Power and Popular Politics cluster, IDS. She works on citizen engagement in governance and social change processes, focusing on accountability, responsiveness and power. Rosie has co-led a major impact review of transparency and accountability work, conducted research on citizen agency in fragile and violent settings, and coordinates the Research, Evidence and Learning component of the Making All Voices Count programme. Actively involved in monitoring, evaluation and facilitating learning in initiatives and programmes that attempt to shift power relations, she also convenes and teaches on IDS' MA in Participation, Power and Social Change.

Lyla Mehta is a Professorial Research Fellow at IDS, and a Visiting Professor at Noragric, at the Norwegian University of Life Sciences. She is a sociologist working on politics, power and gender on issues concerning sustainability, water and sanitation, resource scarcity, rights and access, forced displacement, urbanisation and climate change. She has research and field experience in southern Africa and South Asia. Lyla has engaged in advisory work with various UN agencies as well as advocacy and activist work on a range of resource politics issues with non-governmental organisations (NGOs) and social movements in Europe and India.

Marjoke Oosterom is a Fellow in the Power and Popular Politics cluster at IDS. Her research focuses on the effects of violence and conflict on citizenship and identity, agency and participation. She has specific expertise on how young people develop their citizenship and political agency in contexts of violence, in order to negotiate with political actors as well as for pursuing opportunities in the informal economy.

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Jo Rowlands is Senior Governance Adviser in the Gender and Governance team at Oxfam GB, where she has worked since 2001. Before joining Oxfam, she worked for international development and UK-based NGOs as practitioner, researcher and consultant. Her book

Questioning Empowerment: Working with Women in Honduras (Oxfam GB, 1997), based on community-level field research, was one of the early texts exploring the concept of 'empowerment' and is still a core text in many masters' programmes. Her current focus in Oxfam is on programming in fragile and conflict contexts. Other publications include 'Empowerment Examined' (*Development in Practice* 5.2, 1995).

Patta Scott-Villiers is a Research Fellow and convenes the Power and Popular Politics cluster at IDS. She uses action research and ethnographic methods to ask how subaltern people and societies engage the mainstream of development. Two current lines of inquiry and teaching look into the popular politics of food among people on low incomes, and the popular politics of land and governance among pastoralist societies in East Africa.

Thea Shahrokh is undertaking a PhD at the Centre for Trust, Peace and Social Relations at Coventry University, and her research focus is on issues of citizenship, gender and violence. Prior to this she was a Research Officer at IDS for four years. Thea works through qualitative, participatory and visual methodologies. She has conducted research in South Africa, India and Uganda on how gender-based violence affects citizenship identity. Her recent research at IDS was on processes of citizen-led accountability and the role of collective action in challenging the formal and informal institutions that restrict claims to citizenship identity and agency.

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Violeta Vajda is a PhD researcher with the University of Sussex and IDS, focusing on the role that critical whiteness theory can play and how it may be possible to re-conceptualise non-Romani identity as a progressive and positive driver for emancipation. Violeta works with IDS colleagues to support the Swiss Agency for Development and Cooperation (SDC) to improve their work on Roma inclusion. Since 2014, Violeta has been a Resident Programme Manager for the National Democratic Institute, Hungary. Currently, Violeta leads a programme building inter-faith and inter-ethnic dialogue to combat xenophobia and racism in the Visegrad countries.

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Introduction: Power, Poverty and Inequality

Patta Scott-Villiers and Marjoke Oosterom[*]

Abstract Ten years on from the landmark 2006 issue of the *IDS Bulletin* that brought us the 'power cube' – a practical approach to power analysis that offers a way of confronting its complexity – we return to the question of how to analyse and act on power in development. We focus on the ways in which invisible power helps perpetuate injustice and widen inequalities. The contributions call for ways to denaturalise norms and structures of social, political and economic inequality, so that the universal aspirations of the Sustainable Development Goals may have a chance of success. This editorial presents contributors' recommendations for how to reverse the negative effects of invisible power through unsettling the normal and making visible the unacceptable. We end by analysing the conditions under which these activities might be successful and find that change is accelerated when connected spaces at every political level are considered and economic, political and social cleavages are acted on in concert.

Keywords: power, invisible power, inequality, intersectionality, norms.

1 Power and inequality

This *IDS Bulletin* is about power and inequality. It focuses in particular on the workings of power in the reproduction of norms, values and structures that produce or mitigate inequality. We ask how understanding the least visible kinds of power can help us to tackle the damaging aspects of inequality, be it injustice, misrecognition, poverty or disenfranchisement.

In 2006, John Gaventa wrote about an approach to analysing power in society in the *IDS Bulletin*, using a rubric named the 'power cube' (Gaventa 2006). Since that time the approach, a lens on power, has shed light on many different situations at many levels, and its capabilities have been tested in academic and practical realms. Ten years on, we look at what we have learned, in particular about 'invisible' power. Stephen Lukes identifies three dimensions of power: decision-making power, non-decision-making power and ideological power (Lukes 1974). While decision-making power can be observed in the way it ties visible actors (people and institutions) to visible actions and policies,

non-decision-making power operates in the ways that powerful bodies are able to keep certain issues and ideas on or off the agenda in a given decision space. In this *IDS Bulletin,* we pay attention to Lukes' third dimension, ideological power, which he termed 'the most insidious form of power'. It secures people's consent to be dominated, through the generation of norms to which they may become habituated, even when it is against their interests. Such power is invisible, difficult to reverse and is one of the most challenging facets of power analysis (VeneKlasen and Miller 2007).

In this brief editorial, we introduce invisible power in relation to inequality, outline how it figures in the contributions to this issue and consider the authors' suggestions as to how it can be denaturalised and challenged. We draw out a common thread that suggests that invisible power is brought into the light and becomes available for change when it is brought into discussion. Thus, we briefly examine what this means and what conditions might be important for moving from discussion to structural and behavioural changes.

Gaventa and Martorano begin this *IDS Bulletin* by asking how power works in the relationship between economic and political inequality. They show that with economic inequality comes political inequality – those who have less material and financial capital usually have less political capital, their voices have less weight, their networks are less influential and their material capacities to intervene are far weaker than those of the property-owning classes. They conclude that managing these interacting forms of inequality is a matter of politics. It is in politics that decisions about redistributing wealth, equalising citizenship, and resolving social conflicts are made (Fraser 1997).

Gaventa and Martorano also point out that politics is done in interacting formal and informal realms that are in constant operation at global, national, local and household level. Others in this issue note the ways in which economic and political modes of inequality interact with social inequalities of gender, race, sexuality and other ascriptions to create yet more inequality. This confronts the policymaker with a challenge. These social inequalities, which exist both inside and outside economic and political institutions, are made possible by norms and traditions, the powers of which work invisibly as to the way things are done. The complexity often seems too tangled to unravel, and our understanding and responses often feel inadequate. Nonetheless, our contributors offer ways of untangling this complexity using approaches to analysis which take account of multiple dynamics in unequal relations.

2 Invisible power
Invisible power involves the internalised, often unconscious acceptance of dominant norms, institutions, languages and behaviours as natural and normal, often desirable, even if they appear to be against the interests of the actors involved. Acceptance helps to perpetuate an unjust *status quo*. This aspect of power helps explain how certain matters

are, for long periods of time and in many places, not on the agenda for discussion and unchanged, because they are naturalised: unnoticed and satisfactory. Invisible power presents an analytical conundrum, since it is, by definition, out of sight. Usually its influences are unspoken and unquestioned, and its operations defy clear articulation, first because the words or actions that will reveal its workings in a particular instance have yet to be formulated, and second because the words and actions are proscribed. Invisible power affecting political and economic inequality is always and everywhere in operation in physical spaces, be they kitchens, streets, parliaments, factory floors or schools; and in arrangements such as elections, social movements, marketplaces or social gatherings. The power of the unquestioned and the unacceptable also operates at every level of political and economic organisation, from local to global.

The narrowing of perspective that comes with the accretion of norms, values and traditions is not always a bad thing. Institutions provide the order and predictability on which much social, political and economic interaction relies (Haugaard 2012). A form of inequality that may have started as a positive public indictment or definition of a class of people becomes a tacit norm that forbids and limits, sunk beneath the surface of individual and social consciousness. In many ways, such tacit norms of behaviour and belief are the cultures that we need to make living together straightforward. However, once beyond day-to-day consciousness, norms and values also move out of the reach of everyday criticism. It is only once they enter what Giddens called 'discursive consciousness' that they can be discussed, examined and challenged, and the boundaries they set and the values they engender can be ruptured or redrawn (Haugaard 2003).

In this *IDS Bulletin*, our colleagues point to some of the ways in which invisible power is being interpreted in relation to inequality and show how analysing its generation and dynamics can help illuminate responses. Much of the most useful practical and empirical work that has used the notion of invisible power has considered it as a force that holds in place a normative structure, which includes norms of negative discrimination and inequality. In this issue, Howard with Vajda provide a textbook example of this in their examination of a 'historically constructed, persistent complex of customary racism' in the Western Balkans, in which even those who try to overturn it find themselves complicit in its reproduction.

An important strand of thinking on how invisible power becomes embedded in structure is exemplified by Mehta's article (this *IDS Bulletin*). It shows how internalised normalisation of a *status quo* contributes to what Johan Galtung termed 'structural violence', in which social arrangements systematically damage specific persons within a population and result in inequalities and injustices (Galtung 1969). The structure exerts a force that sustains internalised acceptance among the powerful and powerless alike. Mehta shows that unequal access to clean water has been naturalised in global discourse, even

though insufficient and contaminated water leads to early death, ill-health, time poverty and exhaustion for millions of poor rural women and people living in the slum areas of the world's major cities. She explains how invisible power assists in reproducing the exclusion of a substantial proportion of humanity from what should be a universal right. Even though the tendency to reproduce and naturalise exclusion has been the subject of considerable critique and action over decades, it is remarkable then how strongly the process of naturalisation seems to continue to have a hold on all of us. This points yet again to the remarkable power of normality to make invisible extreme inequalities that exclude large numbers of people from universally accepted rights.

On perceiving that exclusion is neither natural nor necessarily desirable, many of us, like the 'white people' described by Howard with Vadja, make a logical turn towards inclusion as an answer. However, invisible power continues to operate as hitherto marginalised populations are recognised and invited into the spaces of the powerful (Land 2015). While they may be present, in an apparently open or welcoming space, the internalised forms and norms still constrain their voice and participation and give precedence to those to whom society has given dominance. Here they may find equal status in some modes, for instance as voters, women or workers, but not in all aspects of equality – millions of women of colour who work and vote continue to suffer structural violence, and growing masses of informal sector workers are still subjected to abusive conditions and unequal services with limited recourse to justice. Invisible power continues to label and position people in a taxonomy of differential entitlement, even as they are welcomed into citizenship, the market economy and multicultural society (Ahonen *et al.* 2014; Hickey and du Toit 2007; Phillips 2011).

Many people on low incomes across the developed and developing world *expect* to get a worse deal from state, society and market than those on higher incomes; they seem to conspire with real but invisible social boundaries limiting what they can do or say, the spaces they can and cannot enter and the social validity of their knowledge (Hayward 1998). Jethro Pettit in this *IDS Bulletin* looks at how this works from the point of view of people on low incomes who stand aloof from formal political processes as far as they are able. Drawing on Bourdieu, he develops the notion of *civic habitus*, by which he shows the calculus of so many who understand well how current norms devalue the equality of their citizenship, and who therefore both choose, and are forced, to abstain from political participation while struggling to make economic progress and maintain social standing (Bourdieu 1990). They may appear politically passive and can hardly be said to be using agency to call the powerful to account and transform the conditions of their adverse incorporation, yet their abstention is also an active withdrawal of consent for the structures that bear upon them. This withdrawal of consent is another manifestation of power. It indicates how, as James C. Scott has shown, there are compensations in silent resistance (Scott 1985, 1990).

The social norms that are embodied through invisible power are not independent of one another and the beliefs and behaviours that they engender interact to create patterns of normality, around which certain actions come to make sense. Intersectionality, as an approach to unpacking invisible power as it acts on real lives and real communities, offers a sense of realism while adding to the challenge of complexity. For instance, the intersection of racism, sexism (and class) that normalises violence against women of colour has been an ongoing problem for more than two centuries and has long been recognised by feminists and equal rights activists (Crenshaw 1989, 1991), but it still continues. Intersectionality's complexity presents a difficulty to those who want to stop the way people are defined by, and trapped in, recursive webs of harmful norms. One norm may be noticed while another continues to operate to keep the discrimination going. This separating of norms that co-create one another may be put down to a positivist tendency to attempt to bracket a given norm, say gender, in order to be able to bring it into the light and deal with it.

However, we can see, as the article by Edström with Kumar Singh and Shahrokh in this *IDS Bulletin* demonstrates in relation to patriarchy from a masculine perspective, that bracketing makes little sense with norms that are intersectional in their origins and in their continuous reproduction. Bracketing dislocates the norm from the ecology in which it grows. The very act of naming and illuminating one or several norms involves the invisible power of intersecting norms over the one who names and the community into which she or he is speaking. Edström *et al.* also argue, however, that not all intersecting norms are equivalent, and that certain normative stances develop particular power in their reproduction. He argues that patriarchy emerges as a fundamental organising principle in society, to which, to various degrees, other norms owe their shape.

Invisible power also produces structures that in turn reproduce its power. These structures are manifest in institutions and organisations, including in the labyrinths of bureaucracy and the strictures of legal systems. Bureaucracies can be understood as ways of ordering society, but also as ways to subjectify (Foucault 1995) and create helplessness among those who have to encounter them, get something from them or be directed by them (Clegg *et al.* 2016). This 'Kafkaesque' vision of the function of bureaucracy is disturbing, since it forces us to think beyond the idea that there is someone that is acting powerfully rather than a system in which we are all captured (Haugaard 2016). We are forced to appreciate that it is not actually possible most of the time to neatly separate those who dominate and are dominated, so our ability to apply systematic ideas of normativity and resistance (even intersectional normativity) is called into question. It points to the possibility that those who suffer the negative effects of this kind of invisible power will be hard put to resist or change it. But change does happen. It has been suggested that the situation calls for disturbance of the power-infused structure itself, 'provok[ing] people to begin to "see" what is ordinarily out of view' as Cornwall puts it in her article in this *IDS Bulletin*.

The way to deal with it, she suggests, is not simply to reveal that which was invisible, but (in a glorious mix of metaphors derived from Edström (2014) and hooks (2004) respectively) to 'undress' the pernicious social pathology that has infected the whole body.

'How does one resist a network of boundaries that limits what is socially possible?', asks McGee in her article in this issue, drawing on Hayward's proposition that power is the ability to define the boundaries of possibility (Hayward 2000). In considering what resistance studies can offer to power theory and vice versa, McGee argues that resistance scholarship has much to offer. She points out that acts of resistance have a quality of persistence that can de-legitimate and eventually erode normatively constructed structures and behaviours. Resistance has negative and positive forms. A person may resist being made an abject subject, but she may also make an *alternative subject* of herself or her group (Akinwumi 2012). McGee notes that no system of power can kill off the power of the imagination to think a world differently (Eyben, Kabeer and Cornwall 2008). The resisting imagination emerges as yet another form of invisible power. Imagination leads people to see what has not yet been seen and speak that which has not yet been spoken.

3 From tacit to discursive consciousness and beyond

The invisible power we have explored briefly here has emerged as normative, embodied, structural, intersecting, boundary-setting, resistant and imaginative. It operates as much in the mind and tradition as through emotions and practical know-how. Haugaard calls this kind of understanding, which exists below the surface of individual and social consciousness, tacit knowledge (Haugaard 2012). Following Foucault and Kant, he notes that 'the courage of constant questioning' means a continuous effort to move knowledge from the 'taken-for-granted realm' to a realm in which situations are discussable, namely to 'discursive consciousness'. We would add here, following Pettit (this *IDS Bulletin*), that to be fully comprehended such understanding also needs to enter embodied consciousness, i.e. emotional and affective realms. Practical, unquestioned knowledge about how things work in a given society or place can be brought into the light, questioned and denaturalised. If we accept this move, then we need to go further and ask what could make denaturalisation effective in clarifying, amending and then changing norms.

Each of the articles in this issue suggest means by which tacit understandings of what is bearable, useful and fair can be brought into question. The main thread here concerns the potential for action by those in civil society, social movements or positions of authority who, as Gaventa put it in 2006 'want to change power relations, e.g. to make them more inclusive, just or pro-poor'. Gaventa and Martorano (this *IDS Bulletin*) argue that if the trend towards increasing economic and political inequality is to be reversed, such people need to understand the power that is keeping the current trajectory on course. They explain how the power cube lens, including, but not exclusively, its focus on

invisible power, can show how changing inequalities reconfigure power. They suggest that clarity on these changing configurations of power is vital for informing our strategies for challenging these inequalities. The power cube lens helps broaden the discursive consciousness so that it becomes aware of the different formal and informal political moments in which inequality is sustained or resisted and challenged. From this broader view come more strategic entry points at multiple levels, encompassing not only policy change, but also strategies to change norms and values. One way of achieving this latter objective, they suggest, might be to create alternatives that help prefigure a different way of living together well.

Discursive consciousness and strategy is not enough to ensure success for those who seek justice, of course. Gaventa and Martorano (this *IDS Bulletin*) point out that the same inquiry can just as well open up new strategies for those who benefit from inequality as for those who suffer it. Thus, they point to the necessity of looking for and strategising towards tipping points when internalised acceptance simply cannot hold out against new ideas. Mehta (this *IDS Bulletin*) too argues for critical mass in bringing the effects and processes of hidden power to light, in order that structural violence in the water domain may be halted. She suggests that it will be consistent 'naming and shaming' of powerful people and the forces that keep them benefiting from inequality that will bring about realisation of this universal right.

Rowlands (this *IDS Bulletin*), in her article about the adoption of ever-more sophisticated forms of power analysis within Oxfam, a large international non-governmental organisation (NGO), is specifically concerned with how those who want change for others should proceed in the light of insights into power. Power analysis offers the possibility, she argues, of understanding how relations that keep women and men poor or marginalised might be changed and their quality of life improved. She also argues that a systematic analysis of power relations opens up entry points for intervention in the informal as well as formal institutions that reproduce unequal life chances. This is not something that is achieved in one round of analysis, however. She points out that much understanding of power is gained through being materially engaged in a power-laden process: 'you often don't know how power really works until you fully engage with it', she says.

Importantly, Rowlands also addresses the power dynamics of power analysis itself. She shows how invisible power inflects the uptake of power analysis, changes its pace and structures how it is deployed. These complications add to the time and attention it requires, since it implies that staff should analyse their own power dynamics as much as they analyse the world they wish to change.

Howard with Vajda (this *IDS Bulletin*) are also reporting from within an aid agency setting, describing and drawing conclusions about a process of reflective practice undertaken with members of the Swiss Agency

for Development and Cooperation in the Western Balkans. We can see that discursive consciousness of difficult issues does not emerge full-fledged, it is nurtured into the light through different techniques of the-self-in-relation-to-the-other and it takes time and commitment. 'Inequitable power relations', they say, 'requires attention from those who are discriminated and those who discriminate', suggesting that it is through the encounter of people who are in social contention (even as they are trying to cooperate) and who had hitherto been interacting in ways controlled by invisible power, that discursive consciousness begins to shift from concern, to awareness, to change. They note the degree to which profound emotions will play a part in the process of encounter and reflection, creating discomfort, but also energy to proceed.

Cornwall's (this *IDS Bulletin*) approach to developing consciousness and change in a patriarchal bureaucratic setting begins with making the invisible visible and destabilising old meanings. She suggests discussing with colleagues what has been taken for granted: for instance, 'what makes a man a man?' She suggests anthropological strategies that 'make strange' combined with participatory methods that 'make visible'. Her strategies encompass ways of deconstructing rules of social interaction and social positioning with interested colleagues and students, and situating these within a broad structural analysis of privilege and power. She goes on to mention ways of unsettling harmful norms in the everyday life of the organisation, for example through artful ways of behaving before and during meetings, a strategy that itself had been born in a storytelling exercise with her colleagues. Finally, she turns to the seeds of a negotiation strategy, offering the powerful a moment to envision the pleasures of being good.

Edström *et al.* (this *IDS Bulletin*) also speak of a process of realisation achieved through reflection, using the notion of intersectionality as a conceptual tool to help pro-feminist men living in poverty to engage with gendered power. He argues that this new, more detailed lens is enough to generate more realistic and thus actionable insight. This realism is also achieved in applying the analysis to real everyday concerns and micropolitics, reminding us of a Freirean popular education approach (Freire 1972). Edström *et al.*, like others in this *IDS Bulletin*, note that it is not only a pedagogy of the oppressed that is needed but also of the powerful, an idea generated by Robert Chambers (2005), those who, including ourselves, ought to be undressed. He likewise is suggesting that it is at a broader level or society as a whole that we should look for normative change: both the powerless and powerful need to recognise that silent acceptance of forms of inequality and exclusion leads to their perpetuation. There is an indication here of an argument that those who want to fight inequality must create and expand discursive consciousness at multiple levels, in multiple spaces, with multiple expressions of power – just as the power cube would suggest.

Is discursive consciousness enough? If we take seriously the powers of *civic habitus* as psychosocial generators of reality, then consciousness is only

a beginning. For people who live in poverty the risks involved in calling for change are often obvious to them and their lives are generally constructed consciously and unconsciously to avoid the risk of challenging power. For people benefiting from the structures of unequal privilege, the potential losses on the one hand, and the apparent impossibility of changing anything so complex on the other, offer powerful reasons not to act. They too are embedded in lives that continuously reproduce their privilege. First therefore, we argue that critical pedagogy needs to go beyond rationality to embrace the embodied cognition and material inequality in which invisible power has so deep a hold. Second, critical and embodied cognition needs friendly spaces in which its insights may resonate at a broad scale across different communities and polities at different levels, through social movements and other coalitions of the willing. The journey from individual consciousness to normative change means working not only at the local level but moving the understanding from the private to the public sphere of a globalised world.

All of this suggests that the Sustainable Development Goals' call to 'leave no one behind', which will only be achieved through breaking the vicious circle of inequality, is more than about policy, increased action, or creating alternative economies. It is also about changing norms of what is possible, and making visible those invisible norms that have hindered our ability to imagine and create a just world.

Note

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Inequality, Power and Participation – Revisiting the Links

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Abstract Drawing on the contributions from the World Social Science Report 2016, *Challenging Inequalities: Pathways to a Just World*, this article examines the relationship between economic inequality and political participation. In particular, using the lens of the 'power cube' approach (www.powercube.net), we argue that understanding the impact of inequality on political participation requires moving beyond the study of its impact on more conventional forms of participation found in voting and 'voice' through established or formal democratic processes. Indeed, this relationship is also influenced by hidden and invisible forms of power, at multiple levels from the local to the global, which affect the rules of the game as well as individuals' aspiration to participate, shaping whether, where and how citizens engage at all. Despite the power of inequality to shape its own consensus, recent evidence also points to the emergence of levels and forms of resistance to inequality outside of traditional channels of participation, which in turn help to expand and prefigure notions of what the new possibilities of change might be. Exploring these dynamics, the article concludes with a brief reflection on possible lessons for activists, policymakers and scholars working to understand, unravel and challenge the knotty intersections of inequality, power and participation.

Keywords: power, inequality, participation, power cube, democracy, citizenship.

1 Introduction
Many years ago, I (John Gaventa, one of the co-authors) found myself living and working in a mining valley in the rural United States (US). The situation was one of glaring inequality: one company owned 90 per cent of the land, through a secretive corporate empire, based in the UK, at the top of which sat a Lord Mayor of London, then one of Britain's wealthiest men. Corporate wealth sat side-by-side with desperate poverty, poor schools, lack of health care, a degraded environment based on unchecked practices of fossil-fuel extraction, and a generally poor quality of life. In my PhD dissertation, later to become the book *Power and Powerlessness* (1980), I asked the question: in a situation of glaring inequality, why does challenge to that domination

not occur? Under what conditions and against what obstacles does rebellion through citizen action begin to emerge?

In that study, I traced how concentration of economic wealth in the hands of a few was translated into political power, which allowed the rich absentee landlords, through their local elites, to shape decisions and the rules of the game to their advantage over a period of a hundred years. Building on the work of Steven Lukes on the three dimensions of power (Lukes 1974), I argued that power was exercised not just in the visible public sphere but also through hidden means, creating obstacles to participation of the powerless, and over time, contributing to their internalisation or acceptance of an unjust and unequal *status quo*.

Today, we find ourselves facing similar patterns of the concentrations of wealth and of growing inequality – only now at a global scale. By now the data are familiar to us all: 62 people own as much as the poorest half of the world population (Oxfam 2016). These disparities continue to grow: the top 1 per cent of the world's population has received 50 per cent of the total increase in global wealth since 2010, while the wealth of the poorest half of the world's population has fallen by nearly 40 per cent (*ibid*.). The World Social Science Report, *Challenging Inequality: Pathways to a Just World,* documents the impact of this trend on broad issues of poverty and growth, health, education, the environment and conflict, concluding that 'unchecked inequality could jeopardise the sustainability of economies, societies and other communities' (ISSC, IDS and UNESCO 2016).

Such patterns of rising inequality have generated significant global concern. Calls for reducing inequality or for creating a more equitable world have been at the forefront of statements by business leaders in Davos and by civil society leaders, and have fuelled a range of diverse political and social movements. Not only is 'reducing inequalities' a standalone goal of the Sustainable Development Goals (SDGs; Goal 10), but also the cross-cutting commitment of the SDGs to 'leave no one behind' itself represents a cross-cutting ambition to address inequality in each of the SDGs.

But while the concern with inequality is rising, we see less recent empirical work that focuses on the question: how do changing patterns of inequality[1] affect patterns of power (Stewart 2011)? Understanding these relationships is critical not only for researchers but also for activists and policymakers. If inequality is linked to power, and if inequality is changing rapidly, are patterns of power and participation also changing? What is the relationship between economic inequality and civic and political inequalities; that is, inequalities of power that preclude those at the bottom from exercising voice and influence over their futures, and that enable those at the top to influence future scenarios in ways that benefit themselves? What are the implications of growing inequality for new forms of civic and political action? (For further discussion, see Gaventa 2016.)

In this article, we (a) briefly examine two contrasting views on the relationship of inequality and participation; (b) re-examine this relationship through the lens of the 'power cube' approach, outlined by Gaventa (2006) in the *IDS Bulletin* on power ten years ago; and (c) explore the implications of this analysis both for the study of power and for strategies of civic and political action.

2 Exploring two contrasting theses

The debate on whether and how inequality affects participation is not a new one. However, very broadly speaking, there are two different views. On the one hand, there are those who argue that high inequality inhibits participation. On the other hand, there is the counter-argument that inequality can itself generate new forms of collective action.

2.1 High inequality inhibits participation

For many decades, this argument has been the prevailing one, especially in American political science. In the US, the classic work, *Participation in America: Political Democracy and Social Equality* (Verba and Nie 1987), argues that we face a participation paradox: those most likely to participate are those who are higher on the social economic scale, whereas those who might most need to participate, to challenge inequalities, are the least likely to do so. More recently, the Special Rapporteur on Human Rights, in a report on the right to participation of the very poor, made a similar argument at a more global level: 'Material deprivation and disempowerment create a vicious circle: the greater the inequality, the less the participation; the less the participation, the greater the inequality' (Carmona 2013: 5, quoting Council of Europe 2013).

In academic studies, the main argument of this strand of the literature is that individual endowments in terms of time, money, and civic skills significantly influence the likelihood of political engagement (Verba, Scholzman and Brady 1995). As a result, rising economic disparities translate into uneven participation in political activities and so unequal involvement in the decision-making process. Inequality and rising disparities may also reduce trust in political institutions and promote a sense of powerlessness, which in turn may contribute to the acceptance of the *status quo*. In turn, economic inequalities are reinforced by other intersecting inequalities. As Kabeer writes, 'social, economic and spatial inequalities in turn contribute to political exclusion: such groups are generally denied voice and influence in collective decisions that affect their lives' (2010: 6).

2.2 High inequality increases political participation

While the notion that inequality impedes participation has perhaps been the dominant one in political science, empirical evidence and recent studies give rise to a competing view. Despite the ability of elites to shape both political opportunities and outcomes, there are counter-narratives in the face of rising inequality, such as the Occupy movement, landless people's movements, food riots and youth revolts. Around the world, the incidence of protests in the face of inequality is

rising (Ortiz and Burke 2016), and anti-austerity movements in Greece, Italy, Portugal, Spain and elsewhere appear to be bringing new actors and voices into the political process.

Just as in the first thesis, these empirical trends are also explained by a competing set of arguments. Rising or persistent disparities may result in feelings of relative deprivation (Runciman 1966) and an increase in anger about the *status quo*. Yet, unfulfilled expectations may lead to lower trust in political institutions, particularly when people blame the government for fuelling inequality or for failing to redistribute (Justino and Martorano 2016), which rather than lead to acceptance of the *status quo* may provide citizens – and especially the worse-off – with additional incentives to engage in politics (Filetti 2016), either through conventional means, such as participation in elections, in social movements or in protest activities (Gurr 1970; Flechtner 2014). In this setting, unconventional means of protest may be perceived as corrective mechanisms of democratic deficit as well as the most effective way to influence the political agenda (Justino and Martorano 2016) and to counterbalance the uneven distribution of power (Filetti 2016).

While both sets of arguments have evidence behind them, there is still no consensus on the complex interrelationships of inequality and political participation. Why does inequality in one context or for one group dampen participation, while in others it is met by mobilisation? How and when do changing patterns of inequality lead to changing patterns of political behaviour? A richer understanding of these relationships is revealed, we suggest, by bringing in a focus on the dynamics of power, and how power mediates between inequality and participation. Changing patterns of inequality are rapidly changing patterns of power. In turn, shifting patterns of power affect where and how citizens engage in political processes. Rather than a linear process, this relationship takes place dynamically, affected by and in ever shifting spaces, levels and forms of power. More understanding is needed of these relationships.

3 Looking at inequality through the power cube lens

Ten years ago, in a previous *IDS Bulletin* on power, John Gaventa presented the power cube as one approach to understanding and analysing power. In that article, he argued for the 'need for activists, researchers, policymakers and donors who are concerned about development and change to turn our attention to how to analyse and understand the changing configurations of power. If we want to change power relations, e.g. to make them more inclusive, just or pro-poor, we must understand where and how to engage' (2006: 23).

Since that time, the power cube approach has been widely picked up and used (see, for instance, Hunjan and Pettit 2012; Pantazidou 2012). To our knowledge, however, very few studies have applied the power cube approach to an analysis of how changing inequalities at the local, national and global level relate to the changing configurations of power, and to the strategies and 'spaces of change' for challenging these inequalities.

Figure 1 The power cube: the levels, spaces and forms of power
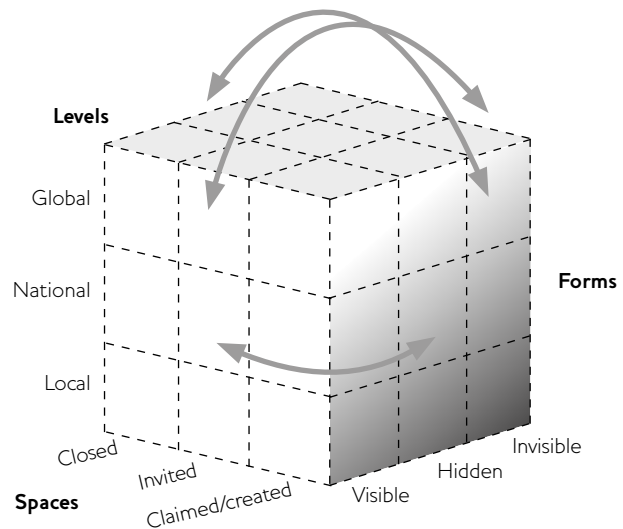
To do so completely would require far more specific empirical and contextual study than is possible to cover in this article. However, both authors were involved in publishing the World Social Science Report, *Challenging Inequalities: Pathways to a Just World* (ISSC *et al.* 2016), a compendium of over 70 articles on inequality from authors from some 40 countries across the world. Drawing from contributions in this report, as well as from other recent literature, we outline next some tentative suggestions for what utilising a power cube lens might tell us about the relationships of inequality and political participation.

One of the unique characteristics of the power cube approach is the interactivity of its various dimensions, where configurations of power are shaped by the interplay of the *forms*, *levels* and *spaces* of power. As argued previously: '[W]ith this more complex approach, the three dimensions of power elaborated by Lukes may be seen as three forms of power along a single dimension or continuum. By thinking of the levels of power and the spaces of power also as dimensions, or continua, each of which interacts with the other, we can visually understand power as a sort of Rubik's cube' (Gaventa 2007: 206), which we have called the power cube (see Figure 1).

3.1 Inequality and the forms of power

Drawing on the earlier work by Lukes, as well as by colleagues at Just Associates and others, the power cube approach distinguishes three forms of power: (1) *visible* power, which is what can been seen in the more open and observable aspects of the political process; (2) *hidden* power, through which certain key actors may exercise control through

shaping what issues and decisions enter the public arena in the first place; and (3) *invisible* power, which includes the psychological aspects of power, including how it affects people's perceptions of what constitutes a legitimate grievance or issue for action in the first place. The argument is that while some forms of power may be understood by observing who participates, and who wins or loses in debates on public issues, other perhaps more insidious forms of power shape what gets into the public arena by control of the agenda and through shaping what is considered to be a legitimate issue and who are considered the legitimate actors.

These three forms of power map easily onto the differing streams of literature on how inequality might shape participation. For many writers, the focus is on how inequality shapes the possibilities of political voice (Verba *et al.* 1995). Here the fundamental concern has been on such questions as who votes or otherwise participates in formal governmental processes, and how socioeconomic inequality affects such participation. As we have seen earlier, a fundamental tenet of much political science, especially in the US, has been that those at the bottom of the socioeconomic ladder are often the least able or willing to engage (Filetti 2016). Another variant of this same approach explores more formal processes of political representation, and asks questions about who holds public office, how those in office are affected by their economic status, as well as campaign contributions and lobbying processes, and how networks of economic elites shape their political behaviours (Bartels 2002). Here an argument is often that political representatives are either economic elites themselves (Gold, Lo and Wright 1975), or are affected by 'political capture' of those elites (Oxfam 2014).

If one focuses on *hidden* forms of power, however, the focus is less on participation and representation in formal political processes, and more on how economic power shapes the agendas and rules of the game of these processes from the outset. As Robert Reich, former US Secretary of Labour, puts it, growing inequality is shaped less by the behaviour of ordinary citizens, and more by 'the increasing concentration of political power in a corporate and financial elite that has been able to influence the rules by which the economy runs' (Reich 2015: 27). Such a view also builds strongly on ideas of power as the 'mobilisation of bias', where 'some issues are organized into politics while others are organized out' (Schattschneider 1960: 71), leading to the conclusion (in reference to US democracy) that 'the flaw in the pluralist heaven is that the heavenly chorus sings with a strong upper-class accent' (*ibid.*: 34–5).

Taking this argument more broadly, post-apartheid South Africa may be seen as a further example of where the formal political process has been opened up to greater participation, yet both old and new elites have been able to maintain and gain power through economic decision-making, often behind the scenes (Gaventa and Runciman 2016). In Russia, the rich oligarchy was able to influence the policymaking process through establishing corrupt relations and manipulating regulation and the legal system to work in their favour during the transition to a market economy

(Glaeser, Scheinkman and Shleifer 2003). In Latin America, *fazendeiros* and *latifundistas* have been historically able to resist redistributive forms of taxation thanks to their strong ties with the political elites. Engerman and Sokoloff argue that in this society 'the elites were both inclined and able to establish a basic legal framework that ensured them a disproportionate share of political power and to use that influence to establish rules, laws, and other government policies that gave them greater access to economic opportunities than the rest of the population, thereby contributing to the persistence of the high degree of inequality' (2002: 17–18).

The third form of power – *invisible* power – what Lukes (1974) argued was the most insidious, deals with the shaping of norms and beliefs of legitimacy, for example what constitutes an issue or subject for contention to begin with. If those at the bottom of the inequality ladder accept the legitimacy – or at least the inevitability – of their position within it, then other forms of power will not be necessary to preserve the *status quo*, no matter how unjust it may be.

Again, we see evidence of how inequality affects and is shaped by *invisible* power. Social norms and beliefs may affect aspirations and expectations of the less equal to challenge or move out of inequality. Some research has argued that people who are marginalised or living in poverty tend to be more pessimistic about their future since they have less opportunities to learn about their abilities and talent (Appadurai 2004; Moreira 2003). In a context of rising disparities, other research also suggests that poor people may be inclined to think that outcomes or positions achieved by rich people are unattainable to them, thus curbing their aspirations and expectations (Ray 2006). In a study of Peruvian children, Pasquier-Doumer (2016) shows that socioeconomic status predicts the level of aspiration, a finding that is echoed in studies in Europe as well (Baillergeau and Duyvendak 2016). These processes could in turn lead to inequality traps, with 'individuals at the bottom of the distribution internalising their inability to climb the ladder and, as a result, assuming behaviours that keep them at the bottom' (Justino and Moore 2015: 18). However, this process is by no means given. In other cases, growing inequalities and shifting social justice norms appear to contribute to greater resistance to inequality (Fukuda-Parr 2016).

3.2 Inequality and levels of power

A second aspect of power has to do with the levels at which it is experienced, ranging from the very micro household level, to the subnational, national and global levels. Understanding how inequality shapes power at each scale and across scales is critical for also understanding where the entry points are for change. Here the globalisation literature tends to emphasise the role of global forces versus the national state. In particular, powerful global institutions are able to influence the rules of the game at different levels, thus reducing the power of the national state authorities (Wood 2002). In contrast, an alternative strand of the literature postulates that the weakening of national states is producing new and transnational spaces and policy

actors, such as transnational social movements (Sassen 2008). Others argue that power is affected more by what occurs within nations, between particular social groups, or at the household and personal levels.

This more general debate is reflected in our understanding of how inequality interacts with power across scales. For many analysts, changing patterns of inequality are both a product of and contribute to changing patterns of global power. Studies in this regard focus therefore on issues of global trade (Caselli 2014), financial flows and international taxation. The recent financial crisis left many with the impression that financial markets are beyond the control of nation states and that the lack of proper financial market regulation has increased economic instability, which in turn has fuelled economic inequalities (Galbraith 2012). At this level, political strategies for tackling inequality also focus on the importance of the global or international arena: through the development of global social policies (Deacon 2016), new financial controls (Griffith-Jones and Brett 2016), or new tax agreements (Moore 2016), and through new forms of transnational and anti-globalisation movements, such as Occupy (Branch and Mampilly 2016).

While global factors are clearly important, others have argued that national policies are a critical space for shaping and mediating inequality. While arguably many nation states have been affected by somewhat similar global forces, it is clear that some nations have been able to pass national policies that can curb inequality, while others have failed to do so (Leach 2016; Green 2016). For instance, in the 2000s, Latin American countries have shown that it is still possible to reduce inequality in a context of open economies adopting more progressive policies in the fields of taxation, public expenditure and labour markets (Cornia 2016). Others have argued for strategies that promote more inclusive governance (Nazneen 2016), or which use legal rights as instruments for challenging inequality (Musembi 2016). For activism, the focus here is on how to put more progressive regimes in power through progressive parties and alliances, such as the Indignados in Spain and the Kínima Aganaktisménon-Politón in Greece, or progressive social movements that argue for more inclusive and equitable national policies, such as in Brazil, Bolivia and other parts of Latin America (Vergara-Camus 2016), recognising that pressure from below and political will from above are often necessary for sustainable national change to occur (Leach 2016).

Yet, others would argue that change can equally emerge from smaller more localised actions through which citizens are attempting to create alternative, more equitable economies (Mathie and Gaventa 2015; Mathie *et al.* 2016). Across the world, the rise of the solidarity economy and similar movements are leading to efforts to scale up from the local to the global and in so doing offer an important counter-narrative to that of the dominant model. As Speth argues, examples such as these help us to envision a 'new operating system', based on 'new economic thinking and driven forward by a new politics' (2012: 9–10). Initiatives that may seem small and local can be starter-wedges that lead to larger

changes and 'provide inspirational models for how things might work in a new political economy devoted to sustaining human and natural communities' (*ibid.*: xi).

While such public spaces are important sites of action on inequality, others argue that change must start with challenging social and cultural norms on gender, race and caste, and these are often learned and reinforced at the household level. In turn, asymmetrical power relations in patriarchal societies result in an unequal intra-household distribution of resources between females and males (Kabeer 2016). To challenge them means going beyond 'only socioeconomic disadvantage or re-distributive concerns', and also entails looking at 'claims of (mis) recognition, stereotyping and violence' that affect voice agency and participation (Razavi 2016).

4 Inequality and the spaces of change
The power cube approach suggests that the forms and levels of power interact finally with the 'spaces' for action and participation. How then do changing patterns of inequality affect the opening and closing of these spaces?

Closed spaces. While over the last few years there has been a growing call for transparency and accountability, it is clear that many decisions affecting the shaping of inequality remain hidden from public view, taken behind the closed doors of bureaucrats or economic elites. The proliferation of tax havens based on financial secrecy offer one such example. The occasional peeks into these closed, non-transparent spaces – such as we saw with the release of the Panama Papers – reminds us of the extent to which the rich will go to hide and protect their wealth, as well as the extent to which economic privilege and political power are interconnected (Green 2016). But there are many other examples of such closed spaces as well. For instance, while hundreds of thousands of protestors 'claimed' their spaces in protests around austerity in Greece, and participated in a national referendum to express their voices, it was ultimately the behind-the-scenes workings of the unelected 'troika' of the European Commission, European Central Bank and International Monetary Fund where the most significant decisions were made (Armingeon and Baccaro 2012).

Against such secrecy, new strategies for greater transparency and accountability increasingly focus on making more visible the economic transactions that benefit elites. In the extractives sector, civil society has started to promote new mechanisms including the Extractive Industries Transparency Initiative (EITI) or the Publish What You Pay initiative (Mejía Acosta 2013; Heller *et al.* 2016). Similarly in the area of taxation, moves are afoot to clamp down on tax havens through new forms of collaboration, such as the Automatic Exchange of Information (AEOI) initiative, which aims at increasing and facilitating the exchange of information among national tax authorities on the tax positions of people and companies (Moore 2016). For those seeking more

democratic participation, such strategies follow the argument of Piketty (2014: 570): 'Without real accounting and financial transparency and sharing of information, there can be no economic democracy'.

Invited spaces. While making closed spaces visible and transparent represents a new entry point for action on inequality, another space connected by the power cube approach has to do with 'invited spaces' – those spaces where the public and policymakers come together for consultation and public dialogue. While there is now a great deal of work on 'invited participation' in relationship to social and democratic issues, there are perhaps fewer examples of such engagement on economic policies and programmes. Citizens may often be 'invited' to engage with issues such as health, education or the environment, but are less likely to be so regarding issues related to economic policy, taxation or trade. On the other hand, one of the most important initiatives for citizen engagement on economic issues related to inequality has been the movements in many parts of the world related to 'participatory budgeting' – to make the allocation of public resources both more transparent and more democratic. Recent work by Baiocchi and Ganuza (2014) has shown how activists in the US view participatory budgeting as one way to fight inequality, not only as a way of gaining democratic participation.

Claimed spaces. Finally, the power cube framework suggests that people may engage not only in institutionalised spaces, but also in their own 'claimed' spaces, whether they be in small-scale acts of resistance or larger scale protests and social movements. Perhaps related to the lack of meaningful invited spaces on issues of inequality, across the world we have seen a surge of social movements and protest activities, many of which have dissatisfaction with issues of inequality at their core. For instance, one analysis of 843 recent world protests (Ortiz and Burke 2016) reflects a steady increase in the overall number of protests every year, with the major increase beginning in 2010 (parallel with the adoption of austerity measures in all world regions). In fact, the largest number of protests during this time were connected to issues of economic justice and austerity, followed secondly by protests linked to political representation and thirdly by those linked with rights (*ibid*.).

Europe is an emblematic case where people's participation has moved from conventional to unconventional channels. Indeed, people have started to consider these alternative spaces as the most effective way to influence the policymaking process (see the case of Iceland, Box 1). On the other hand, Latin American countries are currently experiencing an interesting paradox. Despite substantial and persistent reductions in the Gini[2] coefficient (Cornia 2016), most countries in Latin America have experienced increases in protests and civil instability in the last few years (Justino and Martorano 2016). However, it seems that 'the grievance is not just against the distribution of income and wealth *per se*, but the perception that it is driven by policies and institutions that are unfair, pitted in favour of the wealthy, and perpetuating a vicious circle of ever increasing inequality' (Fukuda-Parr 2016).

Box 1 **Power, participation and inequality – the case of Iceland**

Iceland provides an interesting case study of the relationship between power, participation and inequality. From the nineteenth to the twentieth century, power in Iceland was mainly shared between two groups, popularly known as the Octopus (constituted by a bloc of 14 families) and the Squid (a rural-based business elite) (Wade and Sigurgeirsdottir 2012). They controlled the political system through the two major parties – the Independence Party and the Progressive Party – as well as via media and economic activities, with quasi-feudal power structures, which can be characterised as *'closed spaces'*. During the 1970s, a new group created by law and business administration students at the University of Iceland – known as the Locomotive Group – started to challenge the old established elite, gradually gaining power over the years and taking senior positions in politics and other institutions. Davíð Oddsson, one of the most important members of this group, took the leadership of the Independence Party and led it to election victory in 1991. Holding office for 14 years, Oddsson promoted Iceland's neoliberal transformation under the implicit consensus of the old established elite. One of the most emblematic examples of this new system of power was the privatisation of the banking sector in the late 1990s through which banks were sold at low prices to national and politicised actors, excluding foreign competitors. Other neoliberal reforms contributed to generate an illusory economic boom while the benefits were not shared by all.

The lack of stringent supervision and the easy access to international markets allowed the three biggest banks, Glitnir, Kaupthing and Landsbanki, to fuel a speculative bubble. Before the crisis, these three banks recorded an asset value about nine times higher than the country's gross domestic product (GDP). However, the arrival of the global financial crisis in 2008 pushed Iceland towards a severe recession. International turmoil and the strong depreciation of the *krona* in 2008 forced these banks into insolvency. The Central Bank could not operate as lender of last resort. While the deposits of Icelanders were fully guaranteed, the international deposits were not – provoking strong reactions from the British and Dutch governments, who demanded repayment of their citizens' deposits, in the Icesave branch of Landsbanki, an online saving bank collecting deposits in Britain and the Netherlands. In order to satisfy these requests, Iceland's Parliament issued a public guarantee, first in March 2010 and then in December of the same year. Yet, people strongly rejected the public guarantee through two national referenda, which can be characterised as *invited spaces*.

On 28 January 2013, the European Free Trade Association Court made the decision that Iceland (and its population) was not responsible for any obligations related to Icesave.

The crisis led to weighty protests against the government in late October 2008. Thousands of people armed with pots and pans gathered at Reykjavik's main square (*a claimed space*), calling for the resignation of the prime minister. The 2009 parliamentary election recorded a historical political result marked by the steady shift in preferences towards the left-wing coalition consisting of the Social Democratic Alliance and the Left-Green Movement. Jóhanna Sigurðardóttir became the first female prime minister in the history of the country. People demanded a new society free from corruption and 'based on fairer values' (Thorsdottir 2014: 26). The new government implemented a stabilisation package based on a set of heterodox policies such as capital controls and a severe devaluation of the national currency. The most emblematic measure was the replacement of the flat tax system with a progressive scheme, which heavily contributed to promote a 'fairer process of adjustment' (Martorano 2015). The new policies, shaped and influenced by new forms of popular participation, led to dramatic results. Indeed, Iceland was not only the country which recovered from the economic crisis faster and better than other economies in similar conditions; it also made strides towards reducing inequality, with a drop in the Gini coefficient of seven points between 2009 and 2014.

5 Implications

A strong champion of the idea that 'inequality is not inevitable', Nobel Prize-winning economist Joseph Stiglitz reminds us: '[I]nequality is cause and consequence of the failure of the political system, and it contributes to the instability of our economic system, which in turn contributes to increased inequality – a vicious downward spiral into which we have descended, and from which we can emerge only through concerted policies' (2012: xxxix–xl). What does this rapid review of recent evidence on inequality tell us further about this relationship of inequality and politics, and how we might break this 'downward spiral'?

First, the power cube lens points to the dynamic and multifaceted aspects of the relationship between inequality, power and political action, and therefore how its dynamics may take differing forms at different moments and settings. This broader lens helps us to realise that we cannot understand the links between inequality and political behaviour by only looking at public participation through traditional mechanisms of voting and representation. This latter finding may help to explain the two competing understandings of the links between inequality and participation, which we discussed at the beginning of this article. If one understands participation in narrow terms, then our lens may focus on engagement in the political institutions and processes which are

most affected by inequality, and therefore from which those concerned about inequality may be most disengaged. Alternatively, if we look more broadly at movements to expose hidden and invisible power, and participation in peoples' own claimed spaces rather than those to which they have been invited, then we may have a different view, and realise that there are many forms of resistance to inequality which are in fact emerging outside of traditional channels of participation.

For activists and policymakers concerned about how we construct and widen these pathways to a more equal world, the power cube lens challenges us to think about the multiple entry points for doing so, and the need to simultaneously address the forms, spaces and levels of power that produce and protect inequality. For instance, using the power lens helps us to see that the relationship of economic inequality to political inequality is not just about policy change alone or about shaping who participates in formal political processes, as important as these may be. Rather, the relationship also shapes – and is shaped by – more hidden forms of power, which define the rules of the game, and in turn affects aspirations to engage in the first place. As such, the strategies for countering inequality are also about changing norms and values, challenging and exposing hidden power, and creating alternatives which help to expand and prefigure notions of what the possibilities of change might be.

Growing movements to expose and make more transparent the ways in which economic inequality is shaped, and which demonstrate alternatives, in turn create greater awareness about how the actions of elites in previously closed spaces shape the rules and benefits to their advantage. The surge of activities in new 'claimed spaces' through protests, new social movements and political party formations, and localised, alternative economies attest perhaps to a new politics of inequality, one which offers some hope that the vicious circle of inequality, power and non-participation can be broken.

The power cube lens also reminds us that the power–inequality axis is shaped at every level, from the global to the local, to the very micro. While some work has been done on the strategies and entry points for action to challenge inequalities at each level separately, our power analysis would suggest that work needs to happen not only at each level, but also be linked across them. Yet, we need more empirical analysis of how the rapidly changing patterns of global inequality affect power relationships locally, and of how to form new political alliances and formations that link and synergise actions across the levels and spaces for change.

While the power cube analysis suggests multiple entry points and pathways towards a more equal world, the task is not an easy one. Every new opening for action is also an opportunity for those benefiting from the unequal *status quo* to resist the efforts of those with less money, less recognition, less space, and less access to multiple levels to wrest more economic and political power at the same time. And yet there are also tipping points – the points at which internalised acceptance of the *status*

quo shifts to new forms and realisations of economic and political agency, and new forms of action begin to emerge simultaneously across spaces, forms and levels of change. Where these tipping points are, why and when they occur, is also an area about which we need more understanding.

Finally, for activists, policymakers and scholars alike, inequality–power–participation relationships suggest that we cannot remain in our disciplinary, strategic and policy silos. Scholars of political power need to engage far more with economic power, not only through the broad frame of political economy analysis but with a more precise understanding of how power relations work across both spheres. Those who have promoted policies of social and political empowerment need to pay more attention to economic empowerment as well, and the relationships of one to the other. And those who support policies of political inclusion need to recognise that these may not occur as long as the political landscape is so intertwined with economic inequality, and those who seek more equitable economies, may not get there without new forms of political engagement. While Goal 10 of the SDGs calls for reducing inequality, our analysis would suggest that unless we challenge inequality and its grip on power, then it is hard to imagine that we will gain the political will to reach the broader goals of 'leaving no one behind' in the other social and sustainability goals as well.

Notes

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1 While we understand inequality to be multidimensional, in this article we refer mainly to economic inequality, and its relationship to political inequality.
2 The Gini index is a measure of dispersion, and is the most frequently used measure of inequality which varies between 0 (perfect equality) and 100 (perfect inequality).

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Why Invisible Power and Structural Violence Persist in the Water Domain*

Lyla Mehta

Abstract This article argues that inequality in access to water and sanitation is largely caused and legitimised by different forms of invisible power that prevent universal access. It shows how invisible power combined with structural violence and experiences of unequal citizenship result in dismal access to water that cause systematic harm to poor and marginalised women and men. The article also argues that invisible power and other forms of power imbalance have ended up naturalising water inequalities around the world. While the inalienable universality of the Sustainable Development Goals (SDGs) and their focus on inequality must be celebrated, unless the power imbalances that perpetuate inequality are tackled head on by both policymakers and activists, the SDGs will not achieve social justice. It is thus important for both the sufferers of water injustices as well as water justice advocates to challenge structural violence and invisible power in the water domain.

Keywords: power, invisible power, water, sanitation, citizenship, inequality, SDGs, policy.

1 Introduction

May 2015 – 10.30am Tigray, Ethiopia. I am in a car with other researchers and we are doing fieldwork on the productive uses of roads. We see about 15 women and ten children sitting by two water points surrounded by about 25 canisters. It is an arresting and depressing sight. We stop to talk to them. They tell us that they have been sitting there since 6.30am, that the water in the storage tank is finished and that they are waiting for more water to come. At the moment, there is only a trickle. The tap needs to be turned on by the supervisor who is not around and even when he is around, there is no guarantee that the supply will be enough for all the residents. If the water does not come soon, they will go to the river which is two hours' walk away. River water can be contaminated and polluted and lead to illness, so they try to avoid using it; but sometimes there is no choice. This is why they prefer this source and do not mind paying 15 Birr (about 50 pence) per

canister of water. There are many girls present who should probably be in school. What is striking is that they are sitting patiently and are not complaining. They are used to this situation. They say that sometimes they can spend six hours a day collecting water, even if, like today, it is mostly waiting.

Let me now give you another example from fieldwork, this time from the peri-urban fringe of Delhi, India (see Mehta *et al.* 2014 for more details). Residents in so-called unauthorised colonies of Ghaziabad completely lack any official water provision and often put themselves at great risk to meet their basic needs. This includes crossing a high-speed railway line to access water and it is not unusual that someone is killed every month – so they virtually end up paying for water with their lives. The state supplies water to the largely elite and middle-class housing colonies, leaving poor residents in the villages and informal colonies ignored and bypassed. The little water provided by the state is often of poor quality. Drinking water provided by state handpump is so chemically contaminated that it is said to turn yellow overnight and slum dwellers say that the water is so acidic and yellow that it leads to premature hair loss and skin rashes.

Both these vignettes highlight that there are serious problems regarding access to water for the world's poor and marginalised women and men. Indeed, this is a situation that we have known about for some time. In this article, I argue that inequality in access to water and sanitation is unacceptable and largely caused and legitimised by different forms of unequal and invisible power that prevent universal access. In the case of the women and children waiting patiently for water in Tigray, I intend to show that it is structural violence and the undiscussed that have naturalised the gendered nature of water collection that has knock-on effects on women and girls' health, education and life chances. In the case of peri-urban residents, it is their quasi-non-citizen/semi-illegal status that excludes them from state-sponsored water. The article discusses these issues conceptually before analysing how invisible power and other forms of power imbalances have ended up naturalising water inequalities around the world.

2 Understanding invisible power and its intersection with structural violence and political society

Lukes (1974) made a lasting contribution to power analysis through his elaboration of three dimensions of power, showing that focus must not just be on the factual aspects of power regarding what is decided and why or why not, but instead highlighted that it is important to look at the 'muteness' of powerless groups who are invisible and whose voices are never heard. Building on this, VeneKlasen and Miller (2002) and Gaventa (2006) have distinguished between visible, hidden and invisible forms of power. As with other articles in this *IDS Bulletin*, I am concerned with invisible power, which is the most insidious form because this level shapes marginalised people's consciousness and beliefs, which lead them to accept the *status quo* (see VeneKlasen and

Miller 2002). Here cultural and ideological issues as well as socialisation perpetuate inequality and exclusion (*ibid.*; Gaventa 2006). This is because invisible power operates in a context of structural violence. Building on Johan Galtung (1969) and liberation theory, Paul Farmer and colleagues see structural violence as 'social arrangements that put individuals and populations in harm's way' (Farmer *et al.* 2006 *cf.* Farmer 1996; 2004). These arrangements are structural because they are embedded in the political and economic aspects of daily life; they are violent because they cause harm, though not to those directly or indirectly responsible for perpetuating them. Hegemonic control of water provision is normalised in most societies (*cf.* Sneddon 2013), allowing aspects of water governance (such as prescribing market-based solutions to water scarcity) to emerge as universally applicable and merely technical water challenges rather than the specific outcome of particular forms of structure and power. Lack of access is exacerbated by unequal experiences of citizenship: millions of disenfranchised and semi-legal citizens living in urban areas are only able to access services through quasi-'illegal' means (Chatterjee 2004).

3 A global overview of inequalities in access

I now turn to provide a brief global overview of the inequalities in access before focusing on the power imbalances that justify water inequalities around the world. Inequality in access to water and sanitation is probably one of the greatest crimes of the twenty-first century. As the 2006 Human Development Report has argued (UNDP 2006), no act of terrorism generates devastation on a daily basis on the scale of the crisis in water and sanitation. But it would be fair to say that this is a 'silent' crisis. We are aware of it and much action has been taken; yet it still persists. Perhaps the crisis has not been sufficiently questioned by those who bear the brunt of unequal access to water. In 2015, 663 million people around the globe lacked access to safe drinking water and 2.4 billion people lacked access to improved sanitation with about 946 million people defecating in the open (UNICEF and WHO 2015). This situation undermines good health, nutrition and human dignity. Accessing water can be particularly challenging for smallholders, vulnerable and marginalised populations, and women. Women and girls are often responsible for water collection and may spend between 30 minutes and six hours per day collecting water, undermining their health, educational and life chances. Poor water quality affects human health and ecosystems' functioning. Climate change will add irregularity and uncertainty to the availability of water in many regions (see HLPE 2015).

While these issues are well known and water has been a focus of development interventions and international action since the 1977 Mar del Plata UN World Water Conference and the subsequent International Drinking Water Supply and Sanitation Decade (IDWSSD) (see Nicol, Mehta and Allouche 2011), the invisible power that maintains the problem is as yet poorly understood. There is no dearth of ideas, fora and meetings on how to deal with water challenges. Yet

much of the debate and most of the policies and interventions fail to address water problems in ways that are sustainable and socially just in order to address the interests of poorer and marginalised people (see Mehta and Movik 2014). In March 2012, the world had met the water Millennium Development Goal (MDG) of halving the proportion of people without sustainable access to safe drinking water, well in advance of the MDG 2015 deadline (UNICEF and WHO 2012). But the water MDG was flawed on many counts. It failed to address universality and left almost 800 million people using poor sources of drinking water, with 40 per cent of this population living in sub-Saharan Africa. Rural dwellers and the poorest of the poor were bypassed in the achievement of this goal. Achieving gender equality, social equity and sustainability in relation to water was also often overlooked. Sanitation figures were even more seriously off track. There were several problems around equity, water safety and sustainability due to the focus on the quasi-low-hanging fruit and areas in which it is easy to extend coverage (UNICEF and WHO 2011). Regional variations and variations between socioeconomic groups or by gender were not adequately captured in peri-urban and slum areas, which are some of the fastest growing areas in the world. These areas were not included in the MDG statistics. It is important to note that the original MDG formulation took place before global commitments to rights to water and sanitation were in place (see Mehta and Movik 2014).

The SDG on water and sanitation (SDG 6) has a different emphasis. For example, it seeks by 2030 to achieve universal and equitable access to safe and affordable drinking water for all; achieve access to adequate and equitable sanitation and hygiene for all; and end open defecation. It also acknowledges the importance of paying special attention to the needs of women and girls and those in vulnerable situations. In addition, water quality concerns that were missing from the MDGs are addressed. It also includes a commitment to reduce the number of people suffering from water scarcity and support and strengthen the participation of local communities in improving water and sanitation management (see UN 2015). Like the other SDGs, there is a large number of indicators and hence a risk that there will be problems with monitoring and tracking, and an unhelpful formation of SDG industries in each country. Like with the MDGs, there is also a lack of clear mechanisms of accountability and similarly what each goal and target will mean in every country, district, etc. will always be different and will need to be locally defined. Also generalised, globalised arguments that underpin policy debates tend to remain disconnected from the everyday experiences of local people. For example, SDG 6 is far more nuanced than the MDG in stating what constitutes an 'improved' water source by creating a 'service ladder' from 'safely managed' down through 'basic', 'unimproved' and 'surface water' sources (WHO 2016). As Katharina Welle's (2013) research in Ethiopia has demonstrated, however, there is a big gap between the ways global agencies, national agencies as well as local people understand, define and measure water access and inequality.

It is also somewhat disappointing that this SDG, like all the others, fails to explicitly protect and fulfil human *rights for all*. There is an absence of an explicit recognition of the human rights to water and sanitation, rights that are now globally recognised and also enjoy constitutional recognition in many countries. An explicit recognition of rights would help build in issues of responsibility and accountability. There is also an explicit lack of recognition to the power imbalances that create water and sanitation crises in the first place. As the Women's Major Group says, 'Concentration of power and wealth imbalances that deepen poverty and inequalities within and between countries are not sufficiently addressed, and the agenda lacks targets to reverse this trend. For the SDGs to be transformative they need to acknowledge that the current development model based on growth has failed to address concentrations of wealth that are deepening poverty, inequalities, and environmental degradation' (2014: 2). Thus, it would be fair to say that the SDGs tend to focus on symptoms and outcomes, not the root cause of the problem.

Poverty, concentration of wealth and unquestioned gender and social inequalities are created by, and lead to power imbalances that promote and justify water-related inequalities. Many of these are obvious, visible and brutal. For example, Palestinians face profound water-related inequalities when compared with Israeli citizens. They have access to a third the amount of water than Israelis. Ramallah has the same amount of rainfall as Berlin or London but there is still a 'water crisis' in Palestine emanating from strict policies and a long history of illegal settlements. Due to military and other rulings, Palestinians are not allowed to drill wells and collect water from their rooftops. By contrast, settlers in the West Bank enjoy abundant water (Messerschmid 2012). Discourses such as 'making the desert bloom' and creating 'abundance amidst scarcity' have justified historical land and water grabs that disadvantage Palestinians (see Gasteyer *et al.* 2012).

There are also obvious inequalities in water consumption worldwide. For example, the per capita average consumption of water in California is unsustainable given the local climate and topography and can add up to several hundred litres per day per person.[1] Villagers in drylands in South Africa and sub-Saharan Africa, by contrast, must often survive on less than 20 litres of water a day. These are, however, the visible forms of inequality. There are also more sinister forms of inequality that are unnoticed, unchallenged and legitimised. Unless these are addressed upfront, SDG 6 may fail to address universality and achieve social justice, just like the water and sanitation MDG. In particular, the danger is high for people that could be termed 'quasi-non-citizens': those who are systematically excluded and left to fend for themselves. These include, for example, millions who live in 'informal settlements' or slums, whose occupation of land, use of services and thus position as citizens is often semi-legal. According to Partha Chatterjee, the means by which people in this position achieve rights and services is through 'political society', since their rights are not guaranteed by law or

achieved by civil society, but agitated for through their political potential as masses of voters or protestors (Chatterjee 2004).

4 Structural violence and invisible power go hand in hand

Johan Galtung (1969) refers to the violence through which a social structure or social institutions can harm people by preventing them from meeting their basic needs. Paul Farmer (1996 and 2004) develops Galtung's concept to suggest that usually neither culture nor individuals are at fault, rather it is historically and economically driven processes that tend to constrain individual agency and deny certain social groups access to the fruits of scientific and social progress. These constraints operate through the norms and expectations that make up invisible power as well as through the visible and hidden powers contained in formal institutional processes. Farmer argues that it is the poor of the world who are largely the victims of structural violence and it is the poor whose lives are largely at the behest of bureaucrats, politicians and pernicious policies and programmes such as structural adjustment. The poor's suffering tends to be silenced and they often lack voice, let alone rights (*ibid.*). A good case in point is the fact that daily about 2,000 children die around the world due to largely preventable waterborne diseases. These appear as regular statistics in reports by UNICEF, the Joint Monitoring Programme and non-governmental organisations (NGOs) but do not seem to spark global outrage.

By virtue of *caste*, in India about 1–2 million people are engaged in manual scavenging despite legislation prohibiting this practice (Mander 2016). These individuals stem from the lowest castes (traditionally known as 'untouchables') who encounter daily discrimination and stigmatisation, not to speak of the daily exposure to pathogens and hazardous excreta due to the unhygienic practice associated with manual scavenging. Structural violence has also denied millions of lower caste Indians access to wells and water sources frequented by so-called higher castes. Even though caste discrimination is constitutionally illegal it still abounds all over India. While caste discrimination is cultural, its historical persistence and acceptance has led to its naturalisation, which prompts me to see it as structural violence.

By virtue of *race*, structural violence allowed apartheid South Africa to deny 12 million largely black South Africans access to water (see Movik 2012). By contrast, the white minority enjoyed the benefits of the apartheid state regarding water infrastructure. While post-apartheid South Africa has introduced many impressive policies to reverse these historical legacies, most poor households in South Africa do not enjoy a 'healthy environment' on the basis of the water provided by the state (see Flynn and Chirwa 2005). This is complicated by the fact that South Africa, like many other countries in the global South, has adopted market-friendly positions in its water sector with increasing commercialisation and privatisation of water services, which have undermined the country's commitments to a human right to free basic water (see McDonald and Ruiters 2005; Loftus 2005; Mehta and Ntshona 2004; Harris, Goldin and Sneddon 2013).

By virtue of *gender*, structural violence persists, as I elaborated in the first vignette from Tigray. Why is it that the women were just waiting patiently for water, which took up almost six hours of their day? Universally, it seems to be that no matter how backbreaking and difficult women's water-related tasks may be, these remain unchallenged by both women and men in many societies. The naturalness of women's role in water-related tasks comprises the taken-for-granted aspects of the social world that Bourdieu calls 'doxa' (1977: 167f). Doxa comprises 'the universe of the undiscussed' (*ibid.*: 168). It refers to those aspects of the social world and tradition that are silent, not least about themselves, and remain unformulated and implicit. This doxa is in some ways internalised and reinforced by photojournalists, government officials and researchers, and has romantic appeal. After all, isn't the sight of rural women with water pots on their heads part of the 'village imagery' of life in rural Asia and Africa? The ideological construction of gender and nature happens within a certain political economic context. In the summer months when water sources dry up, the trudge gets longer and it is invariably the women who bear the brunt of coping with dwindling water levels in the village wells. Another realm of the undiscussed tends to be how access to basic services such as water is linked to the issue of legality and illegality and unequal manifestations of citizenship. Peri-urban spaces embody these dynamics to which I now turn.

5 Invisible power and political society in the peri-urban fringe
Urbanisation and peri-urbanism in the global South have challenged the model of universal water and sanitation provision – usually public – that followed on from the water and sanitation reforms of nineteenth century Europe (see Mehta *et al.* 2014). The peri-urban locality is characterised by administrative and jurisdictional overlaps and ambiguities, environmental degradation, marginalisation, lack of services and regulation, informality, illegality and political marginality. Peri-urban areas are often (fallaciously) viewed as temporary and thus completely bypassed by policymakers. The insecurity of land tenure, housing rights and dense housing create very difficult conditions in which to build sustainable water and sanitation systems. How do people access water and how are rights to water realised in such dynamic and largely 'ungoverned' spaces? As pointed out by Partha Chatterjee (2004) in most parts of the post-colonial world, there are limits to the ideal of universal citizenship premised on the notion of equal citizens as bearers of rights. Due to technologies of governmentality (*cf.* Foucault 1991) the modern state has created a distinction between citizens who are rights bearers and populations who are the targets of government policies, laws and interventions.[2] As pointed out by Chatterjee, poorer people in most countries of the global South are considered to be members of social groups that 'transgress the strict lines of legality in struggling to live and work' (2004: 40). Here the distinction between 'civil society' and 'political society' is important. The former comprises the middle and upper classes who are the focus of policies and state attention. By contrast, political society – often comprising so-called 'illegal' and disenfranchised citizens – meet governmental agencies by wit and

stealth, and usually access services via informal means and through patronage. Their livelihoods or residence may often be considered 'illegal'. The majority of peri-urban dwellers who live in so-called informal or illegal colonies and who access basic services through informal means would fall within this category according to Chatterjee.[3]

At the heart of Chatterjee's analysis is the current disconnect between the legal order and social practices in many developing contexts. On the one hand, the nation state founded on popular sovereignty grants equal rights to certain citizens. By contrast, many populations are connected to governmental agencies pursuing multiple policies of security and welfare (Chatterjee 2004: 37). It is through these welfare activities that different demographic categories of governmentality and groups emerge (e.g. the poor, illegal, informal localities, etc.). It is also through these categories that claims are exercised and services are accessed. This is particularly true for water. In keeping with Chatterjee's analysis, the vast majority of peri-urban residents and so-called 'informal settlements' colonies remain unserved in most parts of the world and excluded from the formal water system (see Allen, Dávila and Hofmann 2006; Graham and Marvin 2001). These structures are rarely questioned or challenged adequately. They remain invisible and the power dynamics that reinforce them contribute to the precarity of poor residents. It is thus a challenge for most citizens to access water that is safe and secure (see Allen *et al.* 2006 and Mehta *et al.* 2014). In many cases, they also opt out of the formal system, devise their own strategies and do not hope for any benefits from the state. Still, the state plays a key role as an arbiter in delivering or not delivering their rights.

Hidden and unofficial pathways to accessing water are deployed by the migrants, the poor, the so-called squatters and 'invisible' citizens. These range from stealing water from official pipelines to digging one's own borewell. In Ambedkar bastee, an informal colony near New Delhi, residents managed to get a small informal pipeline connected to the main pipeline taking water to middle-class localities. They did this by approaching officials and political leaders in keeping with Chatterjee's analysis. However, unlike the strict distinction put forward by Chatterjee between the strategies pursued by political society and the so-called 'bourgeois civil society', it is also not uncommon for the latter to resort to informal and 'illegal' means to gain more water (i.e. bribes and drawing on political contacts). There is a strong elite bias in the implementation of government policies. Most of the treated water is supplied to the largely elite and middle-class housing colonies, leaving poor residents in the villages and informal colonies completely ignored and bypassed. This is due to the power of categorisation that the state uses to classify people and their settlements as either 'informal' or 'illegal' or both.

Even though poor and informal neighbourhoods exist alongside the elite and middle-class colonies in the region, provision to improve their situation is usually wholly inadequate. While the poor exercise agency

on a daily basis to find ways to access water, there is very little formal mobilisation around the right to water and most poor people are not aware that as Indian citizens they have the right to water. In sum, in peri-urban and slum localities in most countries, there is a continuum between legality and illegality which epitomises how the urban vision is marked by structural inequalities, structural violence and unequal and unsustainable resource use, all of which are sustained in part by insidious forms of invisible power.

6 What scope for justice?

The persistence of water inequalities across the world should be a cause for outrage. These inequalities exist because power imbalances prevent universal access. How does this work? Invisible power goes hand in hand with structural violence to allow undiscussed political, social and cultural arrangements to persist in disadvantaging and causing harm to marginalised social groups. These arrangements are embedded in a system that they reproduce, not least due to the local level impacts of historical legacies, global political economy, unequal citizenship, as well as diverse axes of social difference such as race, class, gender and caste. This structural violence in particular disadvantages members of political society, who by virtue of their 'illegal' status, experience citizenship and access to services in contradictory ways. Most poor people who are denied access to water and sanitation are, as Chatterjee says, 'only tenuously, and even then ambiguously and contextually, rights-bearing citizens in the sense imagined by the constitution' (2004: 38). Elite biases, democratic deficits (and distortions), jurisdictional ambiguities and market-based mechanisms compound the structural violence that leads to such groups largely bearing the brunt of environmental degradation, pollution and water-related injustices. While they are creative and assert agency on a daily basis to informally access water, there is little formal recourse to the legal human right to water. Their vulnerabilities often prevent them from adopting social justice discourses.

To conclude, while the inalienable universality of the SDGs and their focus in inequality must be celebrated, unless the power imbalances that perpetuate structural violence and unequal experiences of citizenship are tackled head on by both policymakers and activists, the SDGs will not achieve social justice. To make real progress on the SDGs, it is important for those in a position to, to bring the invisible out into the open and challenge gender, race and caste injustice, engage in struggles to realise the human rights to water and sanitation for all, including for so-called 'illegal citizens', as well as challenge the power of state and financial institutions that perpetuate injustice. To break the silence of the excluded and disadvantaged, those concerned with social and water justice now need to focus on naming and shaming the powerful actors that benefit from and are immune to growing inequalities as well as marginalised people's suffering.

Notes

* This article draws on various pieces of my earlier research to construct
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1 See http://www.swrcb.ca.gov/press_room/press_releases/2015/
pr040715_rgcpd_febconservation.pdf (accessed September 2016).

2 Governmentality according to Foucault (1991) is an ensemble formed
by institutions, tactics, procedures that allow for the exercise of
complex forms of power that empower some and silence others (see
Gordon 2001). It has a long history and in many cases predates the
modern nation state where the colonial state considered populations
as subjects, not citizens. These trends continue to be endorsed by the
post-colonial state (Chatterjee 2004).

3 Chatterjee has been criticised for not recognising the blurriness
between civil and political society (see Baviskar and Sundar 2008).
In fact, in peri-urban areas bourgeois civil society also transgress
recognised norms and resort to informal means and patronage to
access services.

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Inclusion as an Agenda for Transformative and Sustainable Change: Addressing Invisible Power through Reflective Practice

Jo Howard with Violeta Vajda

Abstract This article discusses discrimination as a form of invisible structural power, and how, if it is not addressed, it can undermine efforts to promote the social inclusion of Romani people in the Western Balkans and Central and Eastern Europe. We argue that there is a need for development practitioners working in Western European aid agencies to be reflective about our own positionality and practice. Through processes of individual and group reflection, aid professionals can become more aware of the operation of invisible power. In the Roma context, this means recognising antigypsyism as historically constructed racism. In this article, we show how invisible power impacts on the lives of Roma people, on social institutions and on the sense of self and position among those who work for 'Roma inclusion'. We also briefly sketch a process of critical pedagogy that we are working on with the Swiss Agency for Development and Cooperation (SDC) that aims to surface invisible power and bring discrimination into the foreground.

Keywords: power, invisible power, Romani, Roma, aid.

1 Introduction

In this article, we are concerned with the role of discrimination in perpetuating exclusion. We discuss how discrimination operates as a form of invisible structural power that subjugates some groups on the basis of their identity, and how this power can be addressed. In particular, we are interested in how we, who work in and with Western European aid agencies, can be reflective about our own practice related to the social inclusion of Romani people, and what happens when we reflect *with* Romani people – those against whom we discriminate, however unwittingly. As authors of this article, we include ourselves in this 'we', since we have been involved as facilitators of a learning process with the Swiss Agency for Development and Cooperation (SDC) in the Western Balkans, and have tried to reflect on our own positionality – our

relative and partly invisible power and privilege as 'white people' – in this process, as well as encourage our colleagues to do so.[1]

Addressing invisible power and taking action to change the norms and narratives associated with it means unpacking how discrimination comes about, as well as recognising it in everyday life. In the Roma context, this means recognising and naming antigypsyism:[2] a 'historically constructed, persistent complex of customary racism against social groups identified under the stigma "gypsy" or other related terms' (Alliance against Antigypsyism 2016: 3). Naming any kind of racism is uncomfortable because it surfaces emotions, but it may also bring recognition and a desire to engage (Love 1997). The discomfort arises in part from the fact that such personal processes are not usually an expected part of professional life, an exclusion that might be ascribed to invisible power. We will argue that these personal elements are important to engage in if we are to address the discriminatory aspects of our work. Addressing discrimination is all the more uncomfortable when the conversation is in a setting in which we are talking and working together with some of the people who experience this racism.

In the wider context of antigypsyism, Romani people are excluded through visible power – the actions that overtly discriminate against them; through hidden power – the more covert but deliberate privileging of non-Roma; but also through invisible power, which enables both non-Romani and Romani actors, including aid workers, to detach ourselves personally from any implication in the marginalisation of the Roma. By not interrogating our identity and the invisible power that comes with it or is set against it, development actors working on Roma inclusion programmes[3] may unintentionally practise antigypsyism, since 'a corollary of the wide acceptance of antigypsyism in our societies is that it is also common among duty bearers, whether explicitly or inadvertently' (Alliance against Antigypsyism 2016: 9). This could be surprising unless we understand that subjects who are not defined by Romani identity (such as many aid workers who work with Roma) have no need to define their own positionality in relation to the development subject, since being white non-Roma, they are not targets of active discrimination. If we were non-white and non-Roma, this would bring its own complexities. In this context, the invisibility of white positionality is the product of a lack of acknowledgement of the historical processes which have created white, and in this case, non-Romani, privilege and the social norms which maintain this advantage: '[W]hiteness has long reserved the privilege of making everyone but itself visible, lest it be exposed as a position within a constellation of positions' (Leonardo 2002: 41).

The argument we are making in this article is that to uncover and address invisible power, Romani and non-Romani development actors need to reflect upon the roles they play in the constellation of antigypsyism. This kind of reflection is about 'positionality' – our relationship with others in terms of the greater or lesser power and privilege accorded to our ascribed identities (racial, but also gender, age,

sexuality, (dis)ability and so on). Yet how can development professionals challenge ourselves to think more deeply about our own discrimination in order to improve our efforts at reducing it? How can we start to be more aware of how our position in society allows us – in different ways in different settings – to discriminate against those less privileged, or in this case against Roma, even while we work to address that discrimination? And if unintentional forms of racism arising from invisible power are surfaced, what difference can this bring to the work of an aid agency? Can this invisible power be transformed and can we begin to forge more equal relationships between aid workers and those they work for?

There is growing commitment amongst SDC staff in the Western Balkans and Central Europe to pay attention to power, and to dedicate time to thinking about what this means in the context of their work with Romani people. We are beginning to explore the forms of hidden and invisible power that perpetuate Roma exclusion, and have started a conversation about SDC's 'Roma Inclusion' work, which includes peer exchange between SDC offices across the region, as well as organising opportunities for deeper reflection about discrimination against Roma. SDC is challenging itself on how to make its work 'effective, sustainable and transformative' (Ruedin, Howard and Vajda 2016).

> Transforming relationships requires paying attention to both discriminated people and those who have power and perpetuate discrimination, avoiding segregation and promoting mixed situations: this is likely to be a long term perspective requiring consistent efforts (*ibid*: 3).

In Section 2, we explain our understanding of invisible power in the context of Romani people in Central and Eastern Europe (CEE) and the Balkans, set out what we mean by positionality and reflective practice, and reflect on the experience of the learning trajectory we are accompanying with SDC. We end with a proposal for critical pedagogy as an underlying principle for guiding reflective practice in an aid agency and address the question of how much reflection and analysis *versus* action is appropriate in a practical organisation.

2 Roma exclusion and the theory of invisible power
2.1 Roma exclusion in the Western Balkans and CEE
The term 'Roma'[4] is used by the European Union (EU) 'to refer to a number of different groups (such as Roma, Sinti, Kale, Gypsies, Romanichels, Boyash, Ashkali, Egyptians, Yenish, Dom, Lom) and also includes Travellers' (European Commission 2012: 2). The group is probably the largest minority in Europe and its members suffer from severe economic as well as other marginalisation (World Bank 2015). Discrimination against Roma has arisen as a historical process that started in the Middle Ages and continues to this day (Baumgartner n.d.). Roma were persecuted in Western Europe in the Middle Ages (Ryder 2002), enslaved in the Romanian territories up until 1856 (Achim 2004), and faced genocide in the Second World War (Baumgartner n.d.). This systematic historical process, each phase of which has been justified by

embedded beliefs about the threat and otherness posed by Roma, has been largely unacknowledged.

It is only recently that antigypsyism has entered the realms of policymaking. It is defined by the European Parliament as 'a special kind of racism that is directed towards Roma, […] an ideology founded on racial superiority, a form of dehumanisation and institutional racism nurtured by historical discrimination, which is expressed by, among other things, violence, hate speech, exploitation, stigmatisation and the most blatant kind of discrimination' and 'one of the main causes of the discrimination and marginalisation that the Roma people have suffered historically in many European countries'.[5] The EU recognises that antigypsyism is perpetuated through policies in education (through segregated classrooms and 'special schools'), housing (Roma find themselves discriminated against by private and social landlords), and the distribution of basic services (Roma settlements are often the last to benefit from infrastructure such as roads, clean water or refuse collection) (European Parliament 2015). This marks a stark departure from previous standpoints that cast Gypsies, Roma and Travellers in the role of the undeserving poor and 'blame the Gypsies for the ills which they suffer, rather than recognising the need for major egalitarian and redistributive reforms' (Ryder 2002: 59). However, efforts to redress discrimination are consistently faced with difficulty. This, we argue, is because of the unchallenged operation of invisible power, which has normalised the subordinate position of Romani people in society. The subordinate position has led to patronage relationships between Roma communities and patrons who include not only public authorities but also international organisations and civil society organisations (CSOs). Activists and academics are increasingly challenging the portrayal of Roma as a vulnerable population that has to be assisted to inclusion into society under these terms (Rostaş, Rövid and Szilvási 2015). This questioning of the often-invisible power relations that perpetuate inequalities is, we argue, a key step towards promoting the kind of inclusion that addresses inequality, abuse and disrespect.

2.2 What is invisible power?
The visibility of power has been debated extensively (Bachrach and Baratz 1962; Lukes 1974). In his critique of Bachrach and Baratz's analysis of power, Lukes (*ibid.*) identified power as having three dimensions: visible (decision-making), hidden (structural bias) and invisible (dominant ideology). Following this classification, visible power can be understood as material and symbolic influence over who participates, who decides, and who controls resources. Hidden power is in operation when the agenda on which society decides its priorities has been decided in advance and the cards are stacked against those with less value and power in the society. Invisible power is a concept that has been used to describe how social processes create and perpetuate inequality by shaping the boundaries of what is felt to be acceptable, normal or possible. Invisible power 'shapes people's beliefs, sense of self and acceptance of the *status quo* – even their own superiority or inferiority' (VeneKlasen *et al.* 2002 in Gaventa 2006: 29).

By shaping the way in which visible and hidden power are maintained, invisible power effectively underpins *enduring* inequality and exclusion, through intersecting cultural beliefs, social norms and ideologies. These beliefs create and normalise hierarchies and exclusions and make it acceptable for service providers to behave in discriminating ways towards those already experiencing hardship (Kabeer and Kabir 2009; ATD Fourth World 2013 in Burns *et al.* 2013). In defining social inclusion, the World Bank usefully highlights it as a 'process of improving the terms for individuals and groups to take part in society' (2013: 4). Forms of deprivation among Roma may be manifest, but the *terms* on which Romani people are marginalised are invisible, and unless these are analysed, social inclusion interventions may in fact perpetuate these terms, which might include, for instance, beliefs about capabilities and tendencies, as well as unquestioned institutional norms of economic, cultural and linguistic usage. This level of understanding of 'white positionality' in relation to and within Roma society is uncommon. Acton and Ryder (2015), for example, find current Roma inclusion policies to be paternalistic and based on narrow, assimilative, interpretations of integration, which limit project goals to service adjustment or superficial consultation. As a result, changes are limited and worse still, can constrain grass-roots initiatives.

Invisible power over Roma people and communities relies on historical processes that have stacked the odds in favour of the majority population and then have obscured this process of increased inequality by sidestepping the discussion around how the majority population has acquired its comparative advantage. Antigypsyism is based on a series of key unconscious societal assumptions that arise out of historical processes of enslavement and persecution that themselves arise out of perceived otherness, nomadism, lack of identity or apparent backwardness of Roma (Rostaş 2016 forthcoming; Matache and Bhabha 2016). While Romaphobia is a strong hatred towards Roma (Rostaş 2016 forthcoming), antigypsyism is a more systemic disease (Alliance against Antigypsyism 2016). Faced with a society whose members as a group subscribe to antigypsyism (whether overt or not), where discrimination is also embedded in procedures and structures, Roma are disempowered from the outset. Thus it is *both individuals and also institutions and policies that are responsible for creating inequality between Roma and others*.

What should be the response of development professionals? How can they equip themselves to be alert to, challenge, and ultimately transform these insidious social norms? Development professionals wishing to challenge inequality and exclusion and promote inclusion may – and already do – identify strategies to address visible and hidden power through supporting advocacy initiatives, building the capacity of social movements, building alliances with particular groups, etc. However, according to VeneKlasen and Miller, to shift invisible power actors need to 'target social and political culture as well as individual consciousness to transform the way people perceive themselves and those around them' (Gaventa 2006: 29). The body of work on power and empowerment

points to the need for those who are discriminated against to build individual and group consciousness, in safe spaces, to reassert their devalued identities. But more recently it also argues for the need for the white helpers to observe themselves. Speaking about how white non-Aboriginal activists in Australia can do transformative pro-Aboriginal work, Land (2015) argues that *those holding the power* need to engage in learning circles where they educate themselves and others about the racism inherent in their positionality and how these influence their work.

2.3 Reflexivity, positionality and why is it important in this work

Tackling the invisible within white culture is a major challenge. The transformation of inequitable power relations, as indicated earlier, requires attention from those who are discriminated and those who discriminate. It is not enough for academics, central government actors, or headquarters or in-country staff of organisations like SDC to reflect on the discrimination practised by people 'in the field' (such as teachers, doctors, nurses, local authority staff), thus giving rise to a false dichotomy between us and them; we as development actors need to critically reflect on our own beliefs, prejudices, practices and positions. Critical reflection (Geuss 1981) means to step back from practice, to analyse it in the light of other practice and theory, and to construct new theories. This *reflexivity* is not generally included in the job description of the development practitioner. Yet without it, we run the risk that our efforts do not transform; rather, they perpetuate the *status quo*. We would even go further and argue that 'coming to understanding and resolving exploitation are linked' (Scott-Villiers 2009: 11) and that deeper understanding of the invisible power of antigypsyism should come *before* problem solving. In order to put ourselves on the path towards the long-term goal of transformation, let us first try to see and understand invisible power, and how so often it is perpetuated in negative ways. The next step, still part of 'coming to understanding' would be to test out our new-found knowledge with those whom we discriminate against, preferably with them in the driving seat and finding some ways of being accountable to their agenda (Land 2015).

A methodological approach for building reflection into our practice has been suggested by Kolb (1976), who developed an experiential learning model with four steps: (1) observation and reflection – examining and reflecting on experience; (2) conceptualisation – advancing understanding by producing models, concepts and theories; (3) testing – practical experimentation in the real world; and (4) action – doing something in the world and experiencing results (Howard, Flores and Hambleton 2015). Reflective practice has at its core what has been called 'first-person' research, which involves taking an inquiring approach to one's own life, professional practice and value system. This is the fundamental first step in the cycle, but in order for our reflection to contribute to change that brings greater justice and equality, Reason and Torbert (2001) argue that we need to engage with second- and third-person voices (explained below). This can build a collaborative understanding of the validity of the new knowledge we are building

Figure 1 The interaction of first-, second- and third-person research and practice
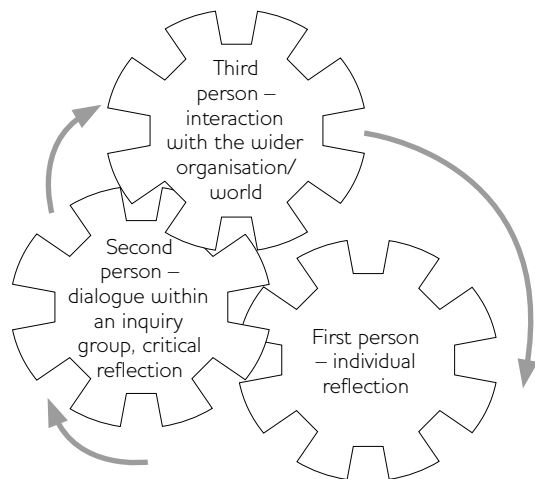
Source The authors.

in the process of reflection, which can increase the effectiveness of our actions, and can open up opportunity for transformation when our assumptions, strategies, and habits are appropriately challenged.

In order to collaborate, those of us who want to work together need to agree what validities are in contention among us. This means that each of us needs to explore the norms and values of our own belief system, and bring them into encounter with those with whom we are cooperating. This approach combines first-person inquiry (which builds individual skills, confidence and agency) with second-person inquiry (dialogue, collective analysis, identifying structural factors). Out of this encounter, we can begin to align our validity beliefs with those of others, through a dialectic process in which we bring into focus some norms which had been invisible to us (e.g. stereotypes, linguistic tropes or physical habits we have unconsciously harboured), and our validity beliefs realign. Through third-person research/practice we can establish inquiring communities, which reach beyond the immediate group to engage with whole organisations and communities.

A key aspect of reflexivity is an awareness of positionality. Our position is our relative status afforded to us through the social categories that we occupy or that are ascribed to us. Categories of social position include education, class, ethnicity, race, gender, culture, age, (dis)ability and other factors (England 1994; Merriam *et al.* 2001; Rose 1997). These are asymmetric relationships along multiple dimensions, which we have learnt to accept as normal, in part because they have become part of the institutions by which our societies manage themselves. These institutions contribute to maintaining the *status quo*, which benefits the more powerful groups. Critical reflection – understood as a cycle of first-person and second-person inquiry – can help us to discern the invisible power

underpinning the relationships between different parts of our position, and our own tendency to take a normative or prejudiced stance based on our positionality whilst believing that we are being neutral.

2.4 The contribution of reflective practice to Roma inclusion

Romani academics have fought a long-standing campaign to show that positionality matters when it comes to understanding the realities of Roma life, and that leaving out Romani voices from the discussion is part and parcel of anti-Roma racism (Bogdán *et al.* 2015). European decision-makers propose to 'promote appropriate training for administrative staff, in order to provide specific knowledge of the difficulties facing marginalised communities, and to combat discriminatory practices, with a view to fostering inclusion through constructive and effective dialogue' (European Parliament 2015: 14). In the European Parliament's view, this would lead to integrated and effective projects with a bigger impact. While we agree with this recommendation, we argue that because of this entrenched structural prejudice, 'appropriate training' in this context cannot mean technical knowledge sharing and dissemination of best practice. Instead it needs to address the deep-seated beliefs and the unconscious bias that everyone carries with respect to Roma people and communities. And without a historical perspective, the poverty and exclusion experienced by Roma can be seen as individual experience rather than the effect of systematic exploitation.

The challenge is complex: policies that seek to include and integrate Roma people are at the same time shaping and influencing Romani identity as 'second-rate citizens' and also the identities of non-Roma (Rostaş 2016 forthcoming). Policy creates rules that can be oppressive and exclusionary, and which produce and perpetuate the 'Roma problem'. But policy also has the potential to solve these problems: once the hidden and invisible power relations that perpetuate the subjugation of Roma people are acknowledged, policies and programmes can be designed that are less paternalistic and exploitative and give more importance to supporting Romani identity (*ibid.*). Reaching this point, we argue, requires – among other things – confronting non-Romani development professionals with the invisible power they reproduce, gaining an understanding of where this power originates and how it affects their work and their lives in general, while also giving the chance to Romani development professionals to do the same but from a different positionality.

This has informed an action learning process that the authors have been following with members of SDC in the Western Balkans. In this process we are trying to interrogate our positionality as white people, i.e. our own (Violeta and Jo), and to support and encourage our white colleagues in the aid agency to do the same. We struggle with this – we have been taught to make our whiteness invisible, and see our power coming from our level of education, our job, our skills and knowledge – through merit rather than unearned privilege. This is a difficult conversation amongst close friends, let alone in a seminar. It is possible, however, if those involved can agree that their own perspective is

limited by societal prejudices, and that while conflict is inevitable, we can use our agency to learn together rather than remain stuck in our respective differences of opinion (Vajda 2015).

Our learning trajectory project with SDC comprises a series of three-day regional seminars (every 12–16 months), and several strands of inquiry, which unfold between the seminars in small learning groups that meet via Skype. Between 2015 and 2016, two groups met around eight times to share experiences and learn together, one focusing on the topic of discrimination, and the other on women's empowerment, both in relation to Roma inclusion. The two groups reported back to the 2016 regional seminar, and will continue into 2017, together with a new group on community development and active citizenship.

The learning trajectory aims to take the following steps: (1) becoming aware of, (2) analysing, (3) acting on invisible power, and (4) becoming accountable for one's actions (Love 1997). A first step has been to facilitate a space in which to reflect on what we have experienced and observed in everyday life (first-person inquiry), and to analyse what we have seen, heard, felt and thought together with peers who can help us to be reflexive through asking probing questions (second-person inquiry), 'developing the capacity to notice, to give our attention to our daily lives, our language, our behaviors, and even our thoughts' (*ibid.*: 471). Accordingly, we conceptualised learning trajectories as processes through which each of us can have multiple meetings and *in a safe space*, relate our personal experiences, reflect on our actions or inactions, discuss the history of antigypsyism and gender discrimination, and identify actions.

We have also sought opportunities to interact differently with people who are oppressed themselves, who can offer us a 'window of understanding' (*ibid.*). During the learning trajectory on discrimination, we built in some feedback from activist members of the Romani community involved in development work, in other words our peers. Throughout the learning trajectories and in particular at the 2016 seminar, SDC staff had the opportunity to interview, formally learn from and engage face to face with Romani colleagues who provided a reality check and a much needed challenge to the learning process. This was useful because it can be difficult for people in dominant roles to *see* injustice. When a (racially) marginalised person 'chooses to share their understanding' with a person from the dominant identity group, the growth and development of the (in this case, non-Romani) person can be significantly enhanced (*ibid.*). A third space, and/or step in this process will be when we development actors take actions in our work outside of the safe space provided by the learning trajectories, based on our new-found awareness and analysis, thus opening ourselves to becoming more accountable for our actions (*ibid.*).

This process of building 'awareness, analysis, action, and accountability' to shift invisible power unfolds very slowly, and 'transformation' seems an exceedingly distant goal. How can an aid agency dedicate time and resources to a process that is so long term? We argue that small

steps are valuable – and essential, since the first step is simply to build awareness of one's own horizon of meaning, defined as a 'range of vision that includes everything that can be seen from a particular vantage point', limited by one's prejudices (Gadamer 2004: 301). Thus the learning process is trying to take small steps, to create opportunities for reflection and dialogue, and build within SDC an action learning strategy encompassing first-, second- and third-person research and practice. Over the three years since SDC held its first Roma inclusion seminar in the Western Balkans, discussions have expanded from the initial enthusiasm to meet and exchange 'best practice', to an interest in deeper reflection that can generate the first two steps of awareness and analysis. Action, at this point, is in the individual and organisational commitment to continue with the learning trajectory. The next phase will develop new action research cycles that draw in new people – more people from within SDC, but also Romani colleagues, and other donors who are present and motivated to join. There are some small steps towards accountability too which, according to Love, is only possible once people divided by discrimination come together to have transformative conversations that allow progress to be made 'in ways that are not apparent when working in isolation and in separate communities' (1997: 473). Such conversations are beginning to take place as we are joined by Romani colleagues in the learning trajectories.

3 Conclusions

The theory of invisible power can clarify how interventions often fail to be meaningful and transformative, despite the best intentions. In this article, we have shown briefly how invisible power impacts on the lives of Roma people, on social institutions and on the sense of self and position among those who work for 'Roma inclusion' and we sketched a process of critical pedagogy that aimed to surface invisible power. We propose that this open-ended reflective process, even though in its infancy, has already built new awareness and analysis amongst us, and has the potential to create accountability of non-Roma towards Roma, and that this is a crucial step in addressing invisible power. This small step has enormous potential. By foregrounding discrimination as central to its work, SDC in the Western Balkans is shifting the discourse from service provision to addressing antigypsyism. It is bringing into discussion the uncomfortable questions, and in so doing, beginning to resolve the tension between what are seen by some as politically correct yet toothless and sometimes counterproductive interventions on the one hand (Zalesak 2016), and the current escalation of dangerous political tensions on the other (Bird and Candea 2014).

Invisible power is perpetuated through the formal and informal institutions (including norms and behaviours) that shape our lives. The Roma guests at the third seminar called for development practitioners to focus on fixing the institutions, not the Roma. They emphasised how this is a task that can only be achieved through working together (i.e. creating accountability): Roma and non-Roma, development 'professionals' with development 'beneficiaries'. This reminds us of Leonardo's insistence that in order for

us to move beyond reductive binaries, we need a 'critical pedagogy of whiteness' that is dialectical, and can 'forge a third space' in which those of us who are non-Roma and committed to transforming discrimination become 'concrete subjects of struggle' and create 'a new positionality, which is guided by non-white discourses' (Leonardo 2002: 46). We would like to introduce such a critical pedagogy as an underlying principle for guiding reflective practice in an aid agency. We have started to do this in our work with SDC and intend to take this work further during the next year or two. A critical pedagogy brings together these different perspectives and positionalities, and helps us all to see differently. Roma guests at the Tirana Seminar[6] put it this way: '[P]rojects should not feed the stereotypes – discrimination is getting stronger' (Ruedin *et al.* 2016: 16). Land (2015) suggests that, while it is possible to make change, an 'enabling experience of discomfort' is both unavoidable and necessary to bring about this shift. The learning trajectory with SDC is providing precisely this enabling experience of discomfort, set into a supportive (work) context that we hope will inspire each of us to continue learning rather than turn away in dismay.

Finally, how much reflection and analysis versus *action* is appropriate in a practice-oriented organisation? We hope that this article has shown the benefits for a development organisation to create space for reflection and learning about how invisible power operates, and the advantages of sharing this space with colleagues. Reflection, as part of the action learning cycle, leads to new, hopefully better, actions. At the seminar, Romani participants recognised that through their actions, SDC staff can facilitate cooperation between non-governmental organisations (NGOs), governments and donors, and can be heard in spaces of formal power where Roma do not have access. At the same time, they encouraged SDC to continue this process of learning and reflection: 'Even though all of you are good specialists, there is still more to do in this area for you to understand the Roma mentality and way of living. Not technical things, but cultural and spiritual things that are part of our identity that are very important but can get lost'.[7] Strategies and actions for addressing invisible power need to happen at all levels, and in this learning process we are seeing the value of putting into practice Robert Chambers' (1997) challenge to the development world for those people who hold power in development to learn from those who do not.

Notes

1 We would like to make the caveat that casting non-Roma in the role of development workers and Roma in the role of programme beneficiaries would be both simplistic and inaccurate. Also, Roma can be both discriminators and discriminated against, while non-Roma can transcend their prejudices. However, they all operate within the structures of racialised reality (Hancock 2008: 97). Another issue we have addressed only lightly in this article for reasons of space is that of internalised discrimination. Bivens (2005: 44) identifies internalised racism as a 'systemic oppression in reaction to racism that has a life of its own', leading to a system of structural disadvantage in which people of colour hold themselves and each other down.

2   Following the recommendation of the Alliance against Antigypsyism, we have deliberately chosen the spelling '"antigypsyism"; not "anti-G(g)ypsyism". This is because the latter would inadvertently give the impression that something like "gypsyism" exists' (2016: 4).

3   By 'development actors' we mean all those who work in civil society organisations (CSOs), government institutions or even in the private sector and explicitly or implicitly seek to improve policies and practices related to Roma. These could include non-governmental organisation (NGO) workers, elected officials, civil servants, front-line staff in organisations tasked with providing services to Roma populations, but also teachers, medical staff, etc.

4   Throughout this article, we use Roma or non-Roma as a noun and Romani or non-Romani as an adjective.

5   European Parliament resolution 'on the occasion of International Roma Day – anti-Gypsyism in Europe and EU recognition of the memorial day of the Roma genocide during World War II (2015/2615(RSP))', www.europarl.europa.eu/sides/getDoc.do?pubRef=-//EP// TEXT+MOTION+B8-2015-0326+0+DOC+XML+V0//EN

6   The regional seminars form part of the learning trajectory that SDC is undertaking in the Western Balkans. The seminars bring together SDC staff to discuss their work on Roma inclusion. The Tirana event was the third regional seminar, to which Roma guests were invited.

7   Voiced at the Tirana seminar.

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Intersectionality: A Key for Men to Break Out of the Patriarchal Prison?

Jerker Edström with Satish Kumar Singh and Thea Shahrokh*

Abstract Reflecting on male gender activists' lessons from India, this article explores how intersectionality can help men (and women) better understand the structure of patriarchy, by connecting it to other forms of oppression, based on class, caste and age. The centrality of the gender and class/caste intersection is well illustrated, as is how understanding this can help men better understand their own internal conflicts around masculinity in the politics of everyday lives. Whilst taking a structural perspective, the work also engages with dynamic and personal change, by balancing structure and fluidity to understand the interactive shaping of identities, as well as of institutions and projects of justice. We see how using intersectionality can facilitate activists' work on personal change as well as on building critical consciousness, by linking it to other social justice struggles. The article closes with reflection on the need for practical tools and directions for further research.

Keywords: power, gender, activist, India, patriarchy, oppression, change, social justice.

1 Introduction

As gender and development actors now increasingly look towards the new global Sustainable Development Goals (SDGs) to link inequality, power and exclusion and 'leave no one behind', we have seen an increased use of the term 'intersectionality', without any clear sense of a consensus on how best to apply the concept. I want to pick up this issue in the context of how men and masculinities feature in debates on power and gender in development, and how this may be better linked to power dynamics rooted in systems of social oppression beyond – but also linked to – gender. In this article I focus in on our colleagues' experiences from India, which demonstrate how work with men can politicise men and masculinities to challenge patriarchal ideologies, precisely by analysing intersecting social inequalities of gender, age, caste or social class. Shared analyses of such intersections within their

communities, homes and workplaces can build shared commitment to struggle for gender and other social justice goals.

I will draw on fieldwork and analysis from two qualitative studies exploring work with men for gender equality in India – from Men's Action to Stop Violence Against Women (MASVAW) in Uttar Pradesh (Edström, Shahrokh and Singh 2015a) and Samajhdar Jodidar (meaning 'Understanding Partner') in Maharashtra (Edström, Shahrokh and Singh 2015b). Both approaches have been supported and nurtured by the Centre for Health and Social Justice (CHSJ) in Delhi, and work by analysing gender within contextually rooted histories of intersecting inequalities as a basis for men's collective and reflective political engagement with feminist objectives (Das and Singh 2014). In these approaches, groups of men have raised their critical consciousness of how deeply rooted power structures institutionalise male supremacy and privilege alongside other forms of patriarchal oppression, which has proved crucial in their challenging their own attachment to powerful masculinities.[1]

In this article I address the central question: can intersectionality – as a conceptual tool – offer a key to help pro-feminist men to critically engage with gendered power and oppression in everyday life, to challenge gender inequality and to break out of their/our patriarchal prisons? As I will argue that it can, I also aim to address the questions of 'how' and 'what more' do we need? The method of this article is to combine some ideas on intersectionality with ideas on patriarchy and power developed in my interactions with colleagues in India, as well as in Africa and elsewhere, to construct an analytical lens on practical experiences of men contesting gendered oppression. I then use this lens to describe and analyse aspects of the two case studies mentioned above. I end by reflecting on the utility of intersectionality and explore avenues for further exploration of the conundrum of how to get men (and women) focused on power and social justice to engage more meaningfully with gender inequity as part of the overall problem of inequality and power.

2 Theoretical refraction for the analysis

CHSJ's approach with partners has increasingly centred on politicising men's personal engagement with gender equality, in terms of a deepening analysis of patriarchy as linked to other forms of social injustice in their lives and over time (Das and Singh 2014). Here the issue of the relationship between patriarchal and other inequalities poses a pressing question, which demands some theoretical reflection. I will take intersectionality to mean the idea that intersecting social identities (overlapping, at the level of individuals) and related hierarchies of social stratification work together in individuals, groups and interrelated systems of privilege and oppression; based on gender, race, class, caste, sexuality, religion, ability and so on (Mohanty 1991; Nash 2008). These interact simultaneously on multiple levels, which can help us understand how different forms of oppression, such as misogyny, racism, elitism and homophobia interrelate and act together. A homophobic or class-based

insult is very often inflected – or laced – with a misogynistic subtext of not being 'man enough', when directed at men or boys.[2]

To begin exploring the theoretical and political potentials and limits to intersectionality, it is useful to reflect on how gender inequality and patriarchy can be understood in work with and by men for gender equality; especially as we need to challenge the basic relationship between men, masculinity and systemic gender inequity. Building on our co-constructed vision of a need to revisit and 'undress patriarchy' as a concept of a social system (Edström *et al*. 2014), our conceptual approach to the study of MASVAW (Edström *et al*. 2015a) was an interactive, participatory peer-enquiry, which was also used to guide our study with Samajhdar Jodidar (Edström *et al*. 2015b). Deploying insights from feminist theory, research on masculinities and on power, men's collective action for gender equality was explored against a critical understanding of patriarchy as a complex, dynamic and adaptive system in which we are all implicated.

Focused on the importance of developing critical consciousness through collective action, we applied a set of four gender-dimensional lenses on: 'Male centredness' (in a sociocultural or representational dimension); 'Male privilege' (in a material and institutional dimension); 'Male supremacy' (in an ideological and political dimension); and 'Male order' (in an epistemological or 'evidential' dimension). The first three are readily linked to the feminist calls for representation, redistribution and redress, respectively, whilst the fourth calls for a pro-/feminist 'reframing' of evidence, knowledge and study method, which is a framework I have laid out elsewhere (Edström 2014, 2015). I have more recently come to realise that another dimension is also required to capture certain issues raised by 'Male identification', stressed by Allan Johnson (1997) as central to patriarchy, and the 'Othering' of women in Simone de Beauvoir's (1949) terms; namely a dimension of identity and history, which can also be clearly linked to women's call for 'recognition'. It is important to underline how this subordination, discrimination, marginalisation and 'Othering' not only applies to many different women, but also to 'lesser males' and all who are subordinated by virtue of not fitting the idealised identity, or being recognised in relation to it. By addressing this elementary dimension of 'identity', we can better locate men's struggle with politicising the personal against internalised 'Male identification', and to highlight how intersectionality is lived also in men's personal identity. This is crucial to understanding not only the multiple identity negations of certain women, or anyone who challenges hegemonic ideals of masculinity, but also to appreciate the depth of the often conflicted and contradictory internal dynamics for men, rooted in their/our internalised and intersectionally shaped identities and political inclinations.

The epistemological dimension of knowledge, or 'knowing', remains crucial in explaining what can be seen and spoken about as 'meaningful', in the sense of invisible 'knowledge-power' giving rise to registers of meaning and evidence through the disciplinary light

Figure 1 Dynamics of patriarchal inequity in four elementary dimensions, revealed through the fifth element – or dimension – of knowledge-power
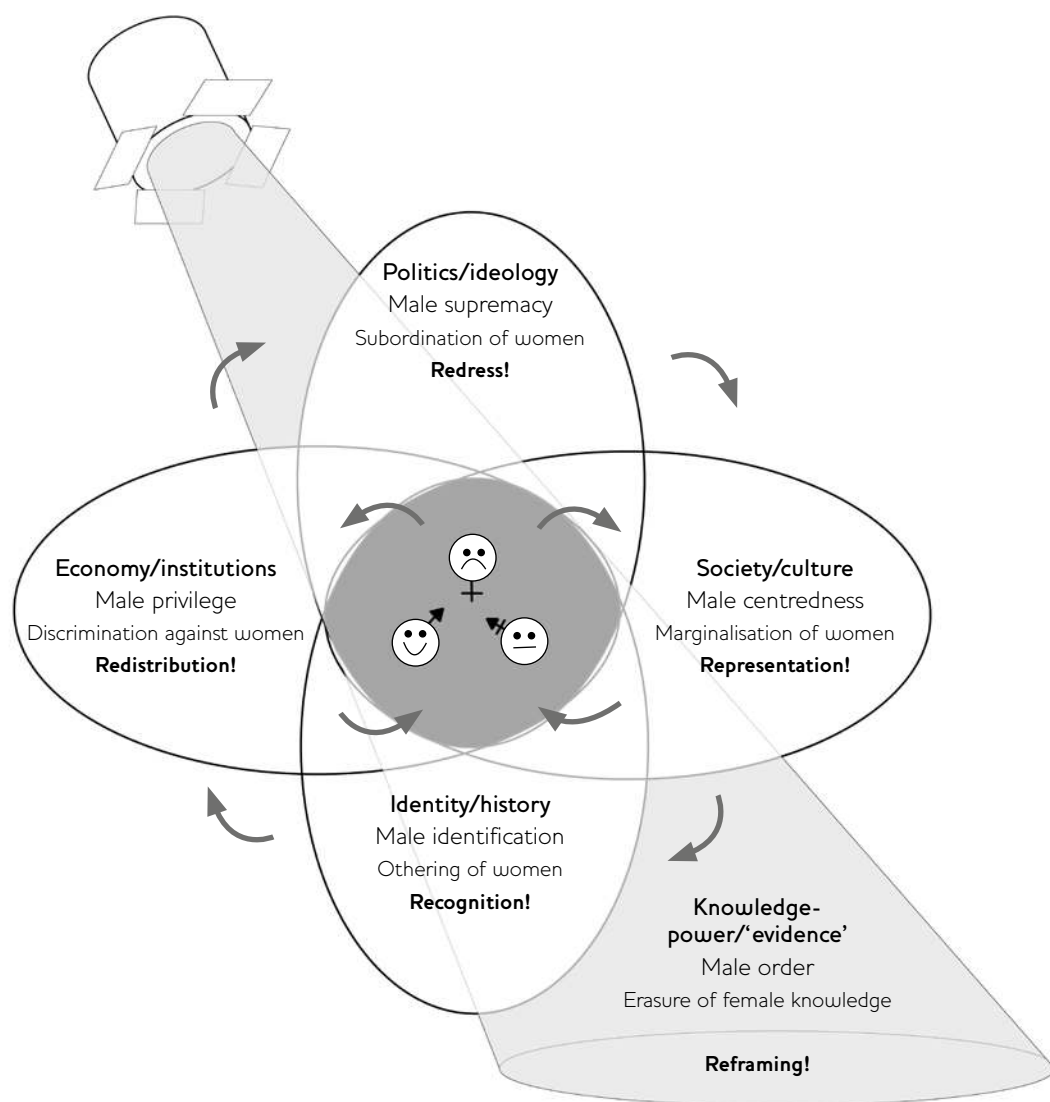
Source Authors' own; adapted from Figure 1 in Edström *et al.* (2015a: 18).

of different 'sciences'. The various dimensions to our interactions and power transactions typically get reduced and fragmented into apparently unrelated monodisciplinary explanations, framing inequalities in economic, political or social terms, whilst the problem of intersectionality itself gets obfuscated by reducing analyses into binary categories or distinct hierarchies of social stratification. Whilst there is not enough space here to elaborate these ideas more fully, Figure 1 attempts to interrelate the ideas schematically and hopefully obviates the need for another 1,000 words.

So what can a stronger focus on intersectionality add? Crenshaw famously suggested that intersectionality may be useful to mediate 'the tension between assertions of multiple identity and the ongoing necessity of group politics' (1991: 1,296). Distinguishing the concept from the (related) view of 'anti-essentialism' (questioning the category 'woman'), she argued that the fact that there are many kinds of women (or men) who are privileged or disadvantaged on many other grounds than gender, does not mean that these categories are not real or politically important. To ignore the fact that men as a group are typically advantaged simply by virtue of being men is, arguably, to not see the wood for the trees. Yet, a clearer understanding of how 'hegemonic masculinity' – and the internalised expectations related to it – can get manipulated in hierarchically gendered power-orders reveals how many men (and women) are not served by such inequities, and are often harmed (Connell and Messerschmidt 2005).

Common critiques of using intersectionality include its lack of a defined or unified methodology, the common use of 'black women' as the quintessential intersectional subject in some feminist writings (deflecting attention away from the gendered/gendering dynamics in positions of power), vague definitions of the concept itself, or questions over its empirical validity. These critiques calling for disciplinary rigour and reductive, categorical clarity can themselves be challenged as Male ordered, from a feminist perspective and by taking on Jennifer Nash's call to instead 'grapple with intersectionality's theoretical, political, and methodological murkiness to construct a more complex way of theorising identity and oppression' (2008: 1). Complex shouldn't necessarily mean complicated, but it should mean more real, dynamic and potent – both in enlightening and political terms.

Choo and Marx Ferree (2010) helpfully distinguished between three ways of understanding or theorising intersectionality, as (a) group-centred, typically focused on groups with multiple marginalised identities; (b) process-centred, seeing 'power' as relational and interactions as multiplying oppressions at different points of intersection; and (c) system-centred, understanding intersectionality to be shaping entire social systems. The latter moves the analysis beyond associating specific inequalities with ideas of static institutions (e.g. traditional households, or 'the temple') and instead describes social processes which are interactive, historically co-determining, and complex. This is useful because it allows us to connect the analysis into a conversation about the role of patriarchy as an evolving system-wide issue.

Also responding to Nash's challenge, Walby, Armstrong and Strid (2012) deconstruct a number of tensions in the literature on intersectionality, suggesting solutions by combining ideas from critical realism (ideas on ontological depth, social relations and the distinction – as well as connection – between structural inequalities and political projects) and from complexity theory (especially ideas applied to complex adaptive social

systems). They emphasise the importance of reinserting socioeconomic class in connection to gender (which has often been overlooked) and they balance a tension between fluidity in identities versus 'temporal stabilisation' (required for a structural analysis) through pointing to the idea of 'mutual shaping' rather than mutual constitution of identities. Two points to highlight here are (1) recognising individuals' identities as multiple and complex, mutually shaped through interaction in processes of power; and (2) understanding intersecting social inequalities in terms of dynamically co-adapting social systems – systems evolving through material and institutional processes, influenced by the shifting politics and ideologies of co-dependent and/or contesting groups in society.

But, given the focus on intersectionality here, why 'patriarchy', rather than 'kyriarchy'; where multiple intersecting systems of oppression interact without the one necessarily being more fundamental than others? (Karioris 2014). Without reading too much into the notion of 'fundamental' here, and without dwelling on the point that such a framework would dilute the focus on the pervasive problem of gender inequality, there are several good reasons to view patriarchy as a powerful underlying organising principle in most social systems built on inequality. As I have argued elsewhere (Edström 2014: 121), we cannot ignore patriarchy's undeniable historical resilience in outliving and adapting to – and being adapted into – successive social systems through evolving new orders, such as; warring and/or trading city states, slave economies and militarised empires, agrarian feudalism, industrial capitalism, or neoliberal globalisation; many of which overlap and coexist interdependently (and/or competing), in purer or more hybrid forms, but remaining patriarchal in different ways. Second, its incredible resilience looks to be rooted in the fact that it operates at the deepest levels of personal psychology and identity – in virtually all competing/ coexisting social systems – whilst connecting the individual to 'the system' through the systemic function of familial human reproduction and socialisation in the (evolving) institution of 'family'. Third, because of its historical evolution – with descent of identity, assets, legitimacy and power through a vertical (typically) male line – it can actually account for ethnic, economic and other social stratification far better than most other logics of social differentiation, as it vertically connects individuals into horizontally segregated groups through the male 'blood-line', over time re/distributing resources and gold in relation to belonging and blood; the very stuff of myth and reality.

So, in order to understand how patriarchal gender inequity operates intersectionally we need to:

- recognise gender as relational and socially constructed through repeated types of performances;

- dislocate men from masculinity and women from femininity to understand the diversity in our lives;

- see gendered power as simultaneously multidimensional (ideologically male supremacist; economically male privileging; socially male centring; historically/existentially male identifying) and epistemologically generated (male ordered), with a reductive gender-binary as central to its more generally reductive logic in its patriarchal form;

- see individuals' identities as intersecting and complex (gendered as racialised and classed, etc.);

- recognise identities as co-shaped by interactions in intersecting processes and structures of power; and

- understand the shaping of intersecting structures of social inequalities (gender, class and other hierarchies) in terms of dynamically evolving and co-adapting complex social systems.

3 Perspectives from men challenging patriarchy in India

In this section I describe certain common features of the two chosen approaches to working with men on gender equality and social justice in India – one with MASVAW and the other with Samajhdar Jodidar – and then reflect on specific perspectives and findings from these studies particularly relevant to the role of intersectionality.

During the last 10–15 years, the issue of gender equality has become increasingly contested in India, with some positive changes recorded set against the emergence of anti-feminist 'men's rights' organisations (Chowdhury 2014). Countering the latter trend, a growing group of men have since 2002 built an engagement for addressing gender-based violence in MASVAW in Uttar Pradesh (UP), which is ranked second among Indian states in 'crimes against women' (Government of Uttar Pradesh 2006: 130). As a state-wide campaign in UP that works at multiple levels to raise awareness and challenge institutions that uphold inequality, MASVAW is a political project and movement, grounded in feminist principles of redressing gender inequalities through critical consciousness-raising. Having spread to schools, universities and local communities, MASVAW men are active in some 20 districts of UP (and three districts in neighbouring Uttaranchal). The campaign is of particular interest, as it addresses gender inequality and violence through working with men to create change-makers in institutional settings, such as in universities and locally elected governance bodies, Gram Panchayats.

In rural Maharashtra, across 100 villages, the Samajhdar Jodidar project works with men to catalyse change at personal and political levels in order to challenge women's subordination in society and to support women's participation in public life and politics (CHSJ 2012). The Indian constitution enacted in 1992 mandated that one third of seats in India's Gram Panchayats should be reserved for women and marginalised groups; increased to 50 per cent in a constitutional amendment in 2009. However, these measures have not been sufficient to ensure effective women's leadership and participation. For example,

women are often registered as holding seats in the Panchayat, whilst being practically prevented from taking part in making decisions by relatives or elite men. The Samajhdar Jodidar project is attempting to change these practices by mobilising groups of men to engage with – and support – female candidates for election, to engage other men in communities and to support men to make personal change, support women and end discriminatory practices. Men first work through raising consciousness to transform their own practices in their homes and intimate relationships, which then provides a platform for social action in the wider community, enabling trusting relationships to be built with women to work together for political change in public spaces.

Whilst there are some differences between the two cases (e.g. scale, focus and organisational form), the similarities are perhaps more important: both take a clear pro-/feminist approach to addressing gender inequality as systemic and rooted in patriarchy, seen as interconnected with caste/class. They also both work with men on challenging masculinity and redefining identity for personal change over time.

The following sections provide perspectives from India by drawing direct quotes from interviews and group discussions carried out during fieldwork in UP during 2014 and in Maharashtra during 2015.[3]

4 Understanding gender inequality as systemic patriarchy: seeing the system in us

A significant element for engaging men critically on gender justice for both of the approaches studied in India has been a focus on getting men to see the 'structure of patriarchy' – that is, seeing gender inequity as a systemic issue of social justice – and how this is intersectional, by recognising how it operates together with traditional feudal ideas of gendered age or caste differences and supremacy/subordination. As described to us by a female professor of social work in a university in UP, where MASVAW members are active: 'There are many inequalities and differences... When you talk about gender inequalities then the caste issue is always there'.

During the study with MASVAW, activists debated the question of just how they explain patriarchy in their discussions with men. One participant explained that they guide the discussion with simple questions like: 'who accesses and controls the resources?' and then, as he explained in more detail, 'we link from the discussion of norms [about gender roles] to relating this to power... [including]... access to knowledge, blocking this from girls.' It was explained how they explain that 'institutions and legislation are also... holding up the system of patriarchy. The issues are raised in relation to intersecting discriminations: class, caste, age. This is then related to the question of socialisation.' However, the analysis and approach is not entirely focused on 'the system' but also on men's own roles, identities, investments and often conflicted relations to this social order.

In Maharashtra, men in the Samajhdar Jodidar project also analyse and talk about gender inequity in terms of systemic features and as linking

with caste and class issues, but they also focus strongly on members' own processes of change by working on their relationships, typically with their wives or partners. Their motivations for changing gender relations are usually rooted in deeply personal experiences, which were illustrated through activists sharing 'life journeys' during the research in both Maharashtra and UP.

One activist described witnessing a lot of violence from his uncle (beating his wife and children) and how his own father, though never physically violent, was also manipulating his mother by saying 'you are lucky I am not like [him]'. He was very used to helping his mother as a child, but members of the community and of his family would tell her that 'you are raising your son like he is a girl'. Eventually he married a Nepali woman in an inter-caste marriage and had to leave his family to come to the city, an experience shared by several activists. Estranged from his family for a long time, he visited occasionally and felt a loss of emotional connection. Having a daughter of his own, he once intervened in an incident where he found some boys attacking a girl from his home-village during a ritual festival. Having saved the girl, his family were very upset because he had put his own life in danger for another's, and for a girl no less!

Another activist, now working directly with CHSJ, described having witnessed his powerful father as 'feared' in the community and local politics. This activist went through similar experiences of railing against injustices towards his mother and sister and later found work with a local non-governmental organisation (NGO) addressing violence against women and girls. To his deep disappointment, however, his close colleague who was the daughter of the organisation's director was pressured into an arranged marriage. Both MASVAW and Samajhdar Jodidar were described as supportive and life-changing spaces where these men could now work meaningfully for change, although most recognised their ongoing internal conflicts as men.

The husband of a female Sarpanch (head of the Gram Panchayat) in a village in Maharashtra, who had been supported by a local men's group, described how he also faced many pressures from others in the community whilst supporting his wife to go into local politics. However, he also explained that he still felt some internal conflict:

> *I believe in gender equality and I have two daughters… and there should be no difference between women and men. If I am addressing others I can say this, but also – truly, inside – I think it would be better to have one of each. There is a pressure to carry out the heredity; an inside pressure.*

5 Focusing on the gender–caste/class intersection to politicise men's engagement
The issue of how caste and class (and sometimes religion) intersect with gender, came up repeatedly as a pervasive and deep-rooted issue in how people saw gender inequity as an issue of social justice. Common examples included family and communal resistance to inter-caste and

inter-faith marriages, how local gender politics in the Panchayats are typically cast in class/caste terms with patriarchal elites, and how caste differences result in gendered differences in treatment or harassment at work or in education.

On the issue of marriage, not only are women legally discriminated against in a number of ways (including on the legal age of marriage), but inter-caste and inter-faith marriages are particularly castigated. One female activist from a MASVAW partner in UP – the Humsafar Support Centre for Women – explained how the judiciary and marriage courts do not generally support women's right to choose and how they will tend to support the wishes of their broader extended families. She explained that 'inter-caste, [or] inter-religious marriages, these are not accepted… You have to go to the special marriage court to register this'. And, she added, '[i]f there is going to be a marriage… then their images will be posted outside the institution, so there will be a response from the community'. A group of young (unmarried) men we met in Maharashtra also discussed this topic, pointing out that in inter-caste marriage 'there is some freedom for boys, but not for girls. There is a strong resistance to girls marrying across caste', suggesting that this cultural transgression is doubly proscribed for women. In an initial planning workshop for the research in UP, one MASVAW activist explained that 'sometimes inter-caste marriage is seen to increase the number in the religion from the men's side', adding that the 'man's religion is then the priority…'.

We came across several examples of how caste/class intersects with gender in the area of local politics and public participation. A female Sarpanch in a village in Maharashtra discussed an issue of men violently preventing her taking on the leadership position. She explained that '[w]ithin the opposition party, there are high levels of male domination', and that 'with their own women representatives, they will just put women's names on the sheet but men will attend [in their place].' The husband of another female Sarpanch in Maharashtra described some challenges he faced from others in the community because of his support for his wife's work in local politics, pointing out that the 'opposition came from rich, upper-class people in the opposition party'. He went on to explain that the political struggle in the community is 'mostly class-based' and that 'the rich are fighting back. The poor took on the gender equality agenda and the rich women don't leave their houses.' During our fieldwork back in UP, we came across this dilemma quite literally when our planned meeting with male community members and activists was 'torpedoed' by a local community-based organisation (CBO) having invited the husband of the block-level chief, or Block Pramukh (above village-level Panchayat and Sarpanch), who arrived in an expensive SUV and dressed in shining white clothes to 'lead' our meeting. Later nicknamed 'Mr White' by the research team, it was fascinating to observe this unelected local patriarchal power-broker – seating himself above the crowd on the steps of a monument, his back against the setting sun – explaining to the

villagers (all seated on the ground) and to us researchers (seated on the step in-between) how the problem of sexual harassment was really quite 'limited' locally and mainly a problem amongst the uneducated poor…

6 Working with institutions and intergenerational dynamics

In the work at universities in UP, one female professor of social work we met explained how sexual harassment and discrimination between colleagues in the institution interlink intersectionally: 'When men and women of different castes [work together], then there is discrimination.' She added that this is not limited to discrimination and harassment between genders, but also that 'men will break down other men and women in order to get ahead and to excel themselves in the institution'. In a discussion with a group of male university students in UP, we heard that 'cases of harassment have reduced dramatically since 2003' and that '[t]he situation was very bad, with no system in place where girls could go to raise the issues.' MASVAW activists have worked to institute anti-harassment committees, which has changed the situation, but they pointed out that after 'one case went there [to the committee] recently… the case was compromised through higher caste people closing ranks.' In fact, many people we met explained how cases of reported sexual harassment against women and girls within the universities tended to get settled with 'compromise'[4] in order to protect both the family's honour and the institution itself. The female professor concluded that 'there is a push back from [the] high caste – they are not ready to accept that they are a part of this violence.'

Similar types of institutional resistance were also described in the traditional Panchayats in the communities of UP, as one activist explained during a workshop to map out the issues:

> Our traditional caste-based Panchayat… *takes the decision on the social issue…* [such as the] *sexual violence issue in the community* [which] *does not go in the legal system… This is formed to save the prestige or honour of the caste and the community. So* [it] *is working for specific interests.*

The caste/class intersection with gender was seen as pervasive, but the age–gender intersection also becomes important in these groups' work to challenge patriarchy over time, including within specific institutions. An important inroad for mobilising new members and expanding these movements has been a focus on youth: particularly visible in the community outreach work. The framing of young men as 'agents of change' involves two key aspects, namely: (1) their more open minds as to questioning traditional gender roles and inequalities and (2) a type of demographic momentum effect, as more enlightened young cohorts gradually shift prevailing norms, by numbers and over time. Other dimensions to this effect included (3) youths' better education and access to social media, or (4) tapping into a gradually changing make-up of the social institution of families, with smaller and more nuclear families becoming more possible, as compared to the traditional set-up where young families typically reside with the husband's parents, or extended

natal family. Here, again, role modelling and peer support are seen as important, as activists point to real improvements in their lives to validate their dissidence, and express solidarity in the face of resistance. In the words of a leading activist in UP: 'If we want to make a society non-violent, we have to look at power structures which are patriarchal; and, if we can change those, we can build peace. That is, if men can become "maternal thinkers" too.' He explained that this is a long-term process involving 'positive parenting, fatherhood and socialisation'.

7 Reflections

From the outset we worked with local activists to co-construct the research questions and the central focus of analysing patriarchal oppression came from within the MASVAW group and their own process of critical reflection, supported by CHSJ over the years. The research (in both studies) provided a space to interrogate this further, in order that the learning would feed back into the evolution of the two activist networks as well as to provide conceptual, practical and theoretical insights to a more global audience, generating applied knowledge together across levels and spaces.

So what does intersectionality add that cannot be achieved with a simpler structural view of patriarchal power? The lessons from India show how it can help men (and women) perceive and understand the 'structure' of gendered oppression in a deeper way, connecting it to other forms of identity-based oppressions, based on class, caste, age and religion. Walby and colleagues' (2012) insistence on the crucial importance of the gender/ class intersection (and, in this case, caste) is well illustrated in this Indian context, where it has been recognised for many years (e.g. Mohanty 1991). Understanding this can help men better understand their own internal conflicts and concerns about masculinity, which can all too easily be manipulated in the intersectional patriarchal politics of their everyday lives.

Whilst taking a structural perspective on intersectionality, the work explored in India also engages with social change in a dynamic way, which balances structure and fluidity, not only in what Walby and colleagues (*op. cit.*) refer to as the 'mutual shaping of identities', but also of institutions and projects of justice. The focus on institutions as settings and as targets for change is instructive, as is the targeting of young men in order to shape intergenerational change. There is also an intergenerational dynamic to the groups themselves, where engaging new and young members creates a need for ongoing nurture and supportive relationships between the older and younger members, as well as an evolving engagement with women and women's groups as allies for mutual accountability.

We saw how using intersectionality facilitated activists' work on men's personal change, by working relationally – engaging with the lives of loved ones, colleagues and peers – as well as building their critical consciousness by appealing and linking it to broader social justice issues of caste, religious freedoms or human rights; issues with resonance from the Ghandian movement. It also helped them strategically address multiple 'levels' in their activism, by seeing intersectionality not only

in identities and power structures but also within institutions, processes and 'projects', as pointed out by Choo and Marx Ferree (2010). Understanding the structure of intersections of patriarchal oppression in their own lives, and those of others, clarified connections and contradictions in intersecting political projects of social justice, such as for women's empowerment or sexual rights – and how they related to those, 'as men'. This helped to identify promising alliances, by revealing common – and competing – objectives with other political projects.

It was clear from discussions as to how the engagement with women's groups had become central. As explained in one group: 'We work with several women's rights organisations… because we are a group of men and we may not be culturally sensitive to the rights of women.' However, it was added that 'we need to be aware of the feminist organisation[s] [which] are not holding a rights-based approach…'. One activist in another group pointed out a tension in taking a broader approach: 'Ghandian human rights values was [*sic*.] on all non-violence, but this meant that women's rights were subsumed and needed to be raised separately, [just like] Dalit rights.' He concluded that when '… we are talking about [the] broader issue of equality, we need to recognise what is being left out of this discussion.' Recognising the inherent contradictions and tensions in this is essential to strengthen men's engagement with – and accountability to – both women's struggles as well as social justice more broadly. A way forward can be to keep it focused to the most crucial intersections in any given setting and linking it back to gender, but without trying to find easy solutions and instead engaging with the complexity, as also recommended by Nash (2008).

8 Practical approaches

One way of dealing with this complexity is to focus on specific projects based on everyday concerns about local class or caste inequality, shared by women and men, whilst seeing gender equality as essential to any broader justice. This has enabled men to reach out to women, build trust and solidarity in collective action to address caste and gender inequality in Maharashtra, specifically campaigning together for women's participation in local politics. By focusing on how deeply internalised class, caste and gender hierarchies continue to subordinate women and damage men, exposing such intersectionality can help in building trust across gender within these deeply patriarchal contexts.

In terms of practical action and learning, intersectionality needs to be illustrated with compelling and thought-provoking examples of the micro-politics of peoples' everyday lives, whilst also linking it to the big issues of the day. During the research, activists explained their use of case studies and situational role-plays, but also called for new simple pedagogical tools and exercises in Hindi to be developed and adapted to local situations. This should include tools that can be applied in work with more powerful men as well as youth and activists, as much of their work – particularly at institutional levels – involved engaging with (and often challenging) male 'gatekeepers'.

Speaking of gatekeepers and more powerful men and women, it would be naïve to present an analysis which paints all privileged men as patriarchs, or all people with power as compromised beyond redemption. The reality is that some powerful men have also taken progressive roles for gender equality in social reforms (Chopra 2011; Hearn 2011) and many high caste and urban women in India are (and have been) formidable feminist activists, influencing progressive policies such as laws against rape and domestic violence (Stephen 2009). A sensitivity to intersectionality can also help with building awareness in our gendered power interactions within the research process. Building on a longer history of collaboration, we established a small cross-cultural and cross-gender core team across both studies, with more local additional members in each state, and used exercises like 'rivers of life' to learn about each other and establish trusting and 'horizontal' relationships. Having a female member in the small core team was particularly important to creating open conversations with female participants and in mixed groups. Not only did the research team and local activists debate and reflect on our various privileges and blind spots throughout the process, but we also witnessed and discussed local power dynamics intervening in the research process and vice versa, as alluded to in the example of 'Mr White'.

However, some further reflection is needed on the role of 'the other/ actual Mr White' in this North–South development encounter – i.e. on me, the lead author – and on the roles of others in the team. Whilst the white-dressed local patriarchal power-broker described in the previous section no doubt acted in response to our external intervention into local gender politics, he was also (apparently) invited by the local community-based men's group supported by MASVAW, in turn likely using our visit to consolidate their own political support from block level. Taken unawares by events beyond our control, I – for one – fell into the familiar role of the white Western visitor addressing my questions to 'him', the most powerful local man present, whilst my colleagues took the opportunity to interview other men from the village on the side-lines and out of the back-lit glare of the power performance on the steps of the monument. A somewhat similar situation unfolded in an urban university, where my particular interview schedule was intercepted by the dean, as well as an assistant proctor (responsible for staff discipline). That time I 'cottoned on' more quickly and indulged their attention and perspectives, allowing my local colleagues and female researcher from the UK to engage in separate group discussions with male and female students. What was particularly important in managing this was constant check-ins with the core research team to discuss 'what happened there?' and to develop a way of working 'as a group', where different members took on particular roles, but with openness to critique, self-critique and adaptation. There is clearly a strong need for deliberately finding new ways of engaging the powerful – challenging, bargaining and so forth – facilitating explicit awareness of both internalised and institutionalised resistance along with the risks of co-option, in a way that names and makes visible gendered dynamics in power.

9 Conclusion

Political change for gender equality requires personal change in individual men, but there is also need for organisation, peer support and strategic collaboration between likeminded men, as well as collaboration with women (including in holding men to account). We have seen how groups of men in different parts of India have managed to get politically relevant in challenging patriarchy in their lives; in homes, workplaces and communities. A crucial ingredient seems to be creating spaces to analyse and address the links between gender inequality and other power asymmetries to build deeper understandings of how gendered oppression operates, which also helps to nurture solidarities across gender and class/caste lines and to work together with women to take political action.

So what further theoretical development might be needed to strengthen the analysis and provide them and us with better tools and methods? In terms of research, I have argued elsewhere that, for undressing patriarchy, we need more study of masculinities as intersecting at certain centres of power rather than just at the extremes of poverty (Edström 2014) and that this calls for a 'move beyond Freire's pedagogy of the oppressed to some interactive pedagogy of the undressed' (Edström 2015: 82) or, what Cornwall terms, a 'Pedagogy for the Powerful' (this *IDS Bulletin*). Whilst group identity may be less relevant than 'individual identity', for many people with power, identification with (and in relation to) *masculinity* is still central in driving gender dynamics and transactions. Interesting new work is now becoming visible on exploring men's lives and masculinities in relation to neoliberal individualism and its associated myth of the 'self-made man' (Cornwall, Karioris and Lindisfarne 2016). Without wanting to over-emphasise the importance of the element of intersectionality in how patriarchy evolves, it seems clear that learning how to reflectively reveal intersectionality in our own lives and places of work can be one of the essential keys to help men – and others with some power – to shed the various blinkers of privilege which block critical consciousness, and to unlock the dark patriarchal prisons within which we otherwise blindly struggle to 'get ahead', or simply stay afloat.

Notes

* Written by Jerker Edström, with comments from Satish Kumar Singh and Thea Shahrokh and based on joint fieldwork in 2014–15. I would like to express heartfelt thanks for helpful review and constructive comments from Professor Andrea Cornwall.

1 Our collaboration was built on over a decade of work by the Institute of Development Studies (IDS) engaging men and boys for gender justice. In 2007, IDS convened researchers, activists and donors at an international symposium in Dakar on 'Politicising Masculinities: Beyond the Personal' (Esplen *et al.* 2008), resulting in the book *Men and Development* (Cornwall, Edström and Greig 2011) and several collaborations. For example, IDS joined up with partners in India, Kenya and Uganda to mobilise men to challenge sexual and gender-based violence within institutional settings (Greig and Edström 2012),

which later evolved into another international symposium on 'Undressing Patriarchy' (Edström, Das and Dolan 2014) as well as a number of studies on men challenging violence and gender inequality across: (1) India, with the Centre for Health and Social Justice (CHSJ); (2) Kenya, with Men for Gender Equality Now (MEGEN); and (3) Uganda, with the Refugee Law Project (RLP).

2 I want to flag a minor 'health warning' here in that I do not see an intersectional analysis (or strategy) as being the same as a multidimensional one. By the latter, I refer to multiple dimensions of the same situation, event or problem. For instance, a legal change – such as the repeal of Article 377 against homosexuality in the Indian penal code, or its overturning – has social, economic, political and personal dimensions to the different benefits or challenges in the life histories of women, men and transgenders, as well as for society at large. These often *also* impact differently on people at varying intersectional gender–caste–sexuality positions, and/or on the political dynamics between social movements or political projects.

3 Fieldwork and interviews took place between August and December 2014 in Uttar Pradesh (Edström *et al.* 2015a) and in late July 2015 in Maharashtra (Edström *et al.* 2015b). Please refer to these research reports for further details of research methods and context.

4 The word 'compromise' was typically used for this, which was ironic in the sense that justice was likely also being compromised. That is, it was not clear that the complainants had much voice or weight in negotiating these compromises, as the latter were apparently settled between families, or between families and the institution.

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Towards a Pedagogy for the Powerful*

Andrea Cornwall

Abstract Development organisations have learnt to talk the talk on 'gender'. But in many if not most organisations male privilege and patriarchal attitudes and behaviour persist. This article explores techniques that can be used to make visible some of the dynamics of gendered power in organisations, as part of strategies for changing the scene in the everyday work settings in which these dynamics create obstacles for the enjoyment of greater equality and respect. It draws on anthropological and participatory methods borrowed, adapted and developed in a range of contexts, from action research on organisational culture to the delivery of 'gender training'. Framed by bell hooks' observation that patriarchy is a pernicious and life-threatening social disease that affects us all, the article offers some reflections on interventions aimed at changing the gender order.

Keywords: power, patriarchy, training, masculinity, gender, change.

Development's gender equality effort has been targeted at people living economically precarious lives, rather than at changing those who inhabit positions of power and privilege, including many of us who work in and for development organisations. This article shifts the gaze and asks: what can we do to change our own mindsets and bring about change in our own workplaces? In it, I suggest that if we are to make development work more gender equitable, then we need to start with our own lives, and our own contributions to and investments in patriarchy. If we were to begin to acknowledge our own privilege and recognise our agency and responsibility, we would be in a better position to change the games of gendered power that take place all around us in our own institutions. This article is about using structured interventions and strategic opportunities to disrupt everyday organisational life to do that work of making change happen.

Gender training was for many years about frameworks and also, often, about ways of ordering the world that assigned people and things to categories rather than looking at culture, agency and relationships. Gender theory has gone beyond the old binaries: we now have much more nuanced ways of thinking about power. Robert Chambers (pers. comm.)

has called, after Paulo Freire's (1972) *Pedagogy of the Oppressed*, for a 'pedagogy of the non-oppressed'. In this article, I explore what a 'pedagogy for the powerful' might include. To do this, I work with the concept of patriarchy: one that some would see as belonging almost to another era, associating the word with a kind of radical feminism that gets lampooned in the media. But as Jerker Edström (2014) and colleagues demonstrate, it does some very useful work, precisely because it provides us with a way of framing an issue that affects everyone, even those who would seem to benefit most from it.

What makes the word 'patriarchy' so useful is that it describes something that affects people of all genders. It speaks to us all. It describes the embodiment and sustenance of unjust power, the production and maintenance of unfair hierarchies. Men are also its victims. And they also stand to benefit from ending patriarchy. Indeed, bell hooks argues that for men, 'patriarchy is the single most life-threatening social disease assaulting the male body and spirit in our nation' (2004: 17). As such, it is a powerful concept with which to speak about power. All the more pressing, we might imagine, that we find ways to rid our lives and our societies of patriarchy. And yet, she observes:

> [M]ost men do not use the word 'patriarchy' in everyday life. Most men never think about patriarchy – what it means, how it is created and sustained. Many men in our nation would not be able to spell the word or pronounce it correctly. The word 'patriarchy' just is not a part of their normal everyday thought or speech. Men who have heard and know the word usually associate it with women's liberation, with feminism, and therefore dismiss it as irrelevant to their own experiences (*ibid.*).

How might we work with the concept of patriarchy to shift power relations? Most men and some women benefit from patriarchy without ever consciously realising it. Like white privilege, patriarchal privilege is often invisible to those who enjoy its benefits. But, as bell hooks points out, most men neither make use of the word 'patriarchy' nor think about what it means, how it affects them and the part they may play – wittingly or unwittingly – in sustaining it. Women too may never think through what it means for their own lives, and the lives of their significant others, let alone the extent to which they may be implicated in reproducing it.

Making patriarchal values, attitudes, practices and social arrangements visible is, then, a first step in raising awareness of its costs as well as the ways in which the short-term benefits it offers men, what Connell (1995) terms the 'patriarchal dividend', wreak longer-term consequences. This process needs to address not only the normative attachments that people may have to particular ways of thinking and doing, but the materiality of power: the structural violence that derives from patriarchal social arrangements, the material inequities that are produced and sustained by patriarchal ideals, beliefs and practices.

This article shares some ideas about how to begin to do this. It builds on experiments in training largely hostile or indifferent civil servants and applied researchers in gender equality in the workplace and the field, and experiences of working with organisations who are keen to address their own internal culture, including a recent experience of working with a small London-based international non-governmental organisation (NGO) to explore questions of masculinity in their everyday working environment.[1] And it grows out of a sense that the tools and pedagogical practices used for gender training are not sufficient to engage men in confronting and transforming their own male privilege, questioning their own contributions to sustaining male supremacy and bringing the hazards of patriarchy into clearer view.

In offering these tools for use in gender training and the university classrooms where those who will play a future role in challenging or sustaining patriarchy in their organisations are trained, my aim is to make a practical contribution to the reflections on power and social change that are the focus of this *IDS Bulletin*.

1 Making visible patriarchal practices of power

One of the leading figures in the Men and Masculinities field, Michael Kimmel, is quoted by Christine Beasley as saying that masculinity is invariably invisible in shaping social relations, shrouded in its constitution as the universal, the neutral: 'its invisibility bespeaks its privilege' (Beasley 2008: 86). What may be invisible to a straight white North American man of a certain age, however, is certainly not out of view to the women or indeed to the men of colour or queer men in spaces that such men frequent. What *we* can see is the performativity of particular dominant variants of masculinity coupled with structural power. In many everyday institutional contexts in the UK, for example, utterances that come out of the mouths of white, tall, upper-/middle-class, able-bodied, straight men have perlocutionary effects: that is, because of the structural advantages enjoyed by many such men, their speech acts are in themselves persuasive and authoritative, inspiring people to take notice and to act. These structural power effects reflect and refract societal power structures.

What is needed to make this play of patriarchy and privilege visible to those who cannot otherwise grasp or see it? As Nancy Lindisfarne and I argued in *Dislocating Masculinity* (Cornwall and Lindisfarne 1994), to get to grips with masculinity we need to begin to denaturalise the associations that are often made between men, masculinity and power, and bring into clearer view what is going on in terms of power. Making visible is a first step in this process: brought into view, these dynamics can form the basis for critical analysis. To do this, we need to ask questions. What makes a man a man? Are only men masculine? When a man is told to 'be a man', what does this involve and what effects does it have, including on others? What do men have in common, and how are these commonalities articulated and experienced? If a man fails to live up to masculine ideals, what does this mean for how he is seen by other men and by women?

According to Allan Johnson, the author of *The Gender Knot: Unraveling our Patriarchal Legacy*, 'a society is patriarchal to the degree to which it promotes male privilege by being *male dominated*, *male identified* and *male centred*' (2005: 5, author's emphasis). Recent work by Jerker Edström (2014) and colleagues takes the concept of patriarchy and seeks to 'undress' it, and lay bare male privilege and structural relations of power. The kinds of methods described in this article can be tools for pursuing this agenda in small ways, in training and in work within organisations. They can be stepping stones to developing alternative visions and changing practices, coupling institutional incentives with the design of strategies for accountability.

How do we do this? The way we experience the world and what catches our gaze depends on our positionality and our conceptual, political and intellectual preoccupations (Campbell 2013). The techniques I draw on in this article offer a way of creating an account of 'what is' that allows others to inspect it, to reflect on how it matches their own version, and to bring into view details that may ordinarily evade them. In this way, these methods can be used to create artefacts that can be shared, reflected on and subjected to critical analysis as part of the pedagogic process. As such, they offer a tool for those who would subvert or disrupt the dominant gender order and provoke people to begin to 'see' what is ordinarily out of view. While recognising that bringing about changes in power relations and structures calls for more than changing the ways in which we see ourselves and our worlds, I am also a passionate believer in the power of critical consciousness-raising as part of broader processes of social change.

In what follows, I identify a number of exercises that can be used to engage people in seeing that which they might otherwise fail to notice. I explore two kinds of techniques: those using simple visual devices to unpack and critically reflect on our assumptions, identities and experiences; and those that explore the dynamics of power in everyday life, whether in a workplace or institutional setting or out on the street, as a way of working on what is needed to shift power relations. They can be used to 'unpick' patriarchal attitudes and behaviour, and to explore at personal, interpersonal and societal levels what sustains, nurtures and disrupts it. This can then become a basis for strategies to counter the pernicious social disease that is patriarchy.

2 Identities

2.1 Deconstructing gender

Anthropological practice consists of a process of making strange that which we take for granted, generally through close description that surfaces the 'rules' that appear to underlie social interaction in any given cultural context. Part of this process is to identify and dismantle our assumptions. We might, for example, take words or concepts that we might think mean the same thing to everyone and look at the variety of ways in which they might be understood. Or we might take some kind of belief or moral value, and look at how we relate to it, and

what differences between our perspectives on it might mean. These principles can be translated into a series of visualisation exercises to use with groups, that begin to make gender visible. I prefer using them as a sequence, but they can be used as standalone exercises.

The first is to take the words 'man', 'masculine', 'woman', 'feminine'. Split the group into four, give each group one of these words, blue or black marker pens and a large piece of paper, and ask each group to fill the paper with all the associations they have with these words. Sometimes I ask groups to do this without speaking; this can have a democratising effect on the group's process. But mostly I encourage people to put down what comes into their heads first, then reflect, explore, discuss, add more words, fill up the page. I then give each group a red pen. I ask them to circle *only* those terms that could never be used for the opposite sex/ gender. Quickly the groups come to realise that they're left only with relationship-words and the occasional body part, and even these start to be contested once gender is deconstructed and the conversation moves beyond the gender binary. This is a powerful exercise in uncoupling the kind of associations that may be carried about men's superior strength or about women being 'emotional'. It is also a useful exercise with which to begin to address transphobic, homophobic or heteronormative attitudes.

Once we have dislodged some of those associations, the next step is to move on to thinking about where we get our ideas about men and women, and what these ideas do to and for us. Again, use four large sheets of paper, with 'men should…', 'men shouldn't…', 'women should…' and 'women shouldn't…' written on them. This time put the sheets of paper on the floor. Scatter marker pens around them. Then invite the group to scribble on them any messages they have received about what men and women should or shouldn't do, positive or negative, from any source – the media, school, parents, religious institutions, work or leisure activities and so on. Quickly the sheets fill up. The process that follows is the nub of this exercise.

I generally begin by asking someone to read out the 'women shouldn't…' list; hearing the injunctions one after the next produces more powerful an effect than simply seeing them. I ask the women: how does this make you feel? Often the answer is angry, restricted, suppressed. Then someone reads the 'women should…' list and the story of being limited continues and intensifies. I then ask someone to hold 'men shouldn't…' next to 'women should': sometimes, there is a direct mirror image. I ask again: how does this make you feel? And then I ask a woman, if there is one in the group, to read out 'men should…'. It is a list full of obligation, a heavy-hearted list that regales men with their responsibilities, the things that they are supposed to be competent at, the burdens that they are expected to carry, as well as assumptions about sexual desires and practices that some men may find oppressive rather than sexually exciting, such as always wanting sex and always being able to 'perform'. Reflect together on the impact of this list on men, beginning with the women and moving onto the men. This prompts people to begin to

recognise the negative effects of patriarchy on men, and to begin to make some of the connections between societal injunctions and the injuries that patriarchy inflicts on men as well as on women.

A last exercise to add to this sequence is to split the group in two, give them a pile of index cards and ask them to generate as many words for types of men and women as they can – any words that come to mind, insults, stereotypes, the lot. In a multicultural group, ask people to explain their words. This can provoke some interesting discussions, as people compare notes and surface stereotypes. Then lay all the cards out on the floor, and get the group to pick out unlikely pairs and think about the power relations between them. This works on a number of levels. It puts paid to a simple narrative of male dominance and female subordination. It helps reveal power dynamics between men, and between women. Examining multiple masculinities is an entry point from which to look at the way in which particular masculine styles come to be aspired to or serve as the benchmarks against which men are taken to task, and the ways in which they come to represent idealised forms of what Carrigan, Connell and Lee (1985) famously termed 'hegemonic masculinity'. And it also helps make some important points about the diversity of gender expressions and the power of heteronormativity.

2.2 Gender lines

So naturalised are our assumptions about gender and power, that we might fail to recognise the ways in which we have opted for particular gender expressions and identities in our own lives, or the effects that particular experiences have had in shaping our gender. This exercise seeks to provide resources for critical reflection on how we come to be gendered, and combines the elements of visualisation and storytelling that are common to many of the techniques described in this article. It builds on an exercise that is widely used in popular education called Rivers of Life.

Using a large piece of paper, ask participants to create a visual representation of their 'gender journey' through life, starting at birth. This could be imagined as a river, a road, stepping stones representing key incidents or turning points, or simply a line that represents high and low points. Explain that the purpose of the exercise is to reflect on how we became who we are today, and to draw out those experiences that played a part in shaping our gender at different points in our lives. It might be when people came up against a gender boundary: for example, when a girl was stopped from playing football or a boy was prevented from having a doll. It might be when choices were made about gender expression that changed people's social experiences – for example, cutting long hair, wearing or choosing not to wear make-up. Encourage participants to use pictures rather than words; the use of visual symbols offers a way of reaching beyond the verbal into the associations that come with particular images. People always hesitate, worrying about not being able to draw: make it easier for them by showing them an example of your own, with stick figures and roughly drawn images.

As there is so much to be gained from sharing these gender lines, I tend to run this so that people have time to draw – at least 20 minutes – and to reflect on their drawing with a person of their choice, just to create some intimate reflective space before sharing with the group. I tell people at the outset that we will be sharing our pictures, and invite anyone who does not feel comfortable for any reason to feel free to step out of the exercise. There is a range of reasons why people might not feel comfortable doing this exercise, and it is vital that a safe space is created for people to opt out. Something to emphasise in processing the exercise is the power of the choices we make in performing our gender and the power of the constraint that society places on us at different points in our lives. Patriarchy depends on sharply drawn gender lines: many of us have experienced the policing effects of the gender binary, and also the ways in which our own presentations of gender enable us to conform with or contest dominant ideas about what is 'masculine' or 'feminine'. Build on this to explore the power effects of these forms of enforcement and resistance. For those who have not reflected on their gender identity at all, this can be a powerful exercise as it not only surfaces the normative pressures to conform that we all experience, but also what emerge as choices that we make – even if we are not fully aware of it – whether or not to comply with societal expectations of us.

2.3 The wheel of privilege

We might all know that we enjoy privilege by virtue of our race, our class, or our gender – and other dimensions of difference – but naming and reflecting on that privilege, and hearing about the experiences of those who experience discrimination or privileges we don't have access to, is an important first step towards acknowledging and dismantling some of its effects. Using a simple tool like this wheel of privilege helps open up a conversation about privilege and a space for critical reflection. It is also a good way to introduce the complexities of intersectional difference, and to get beyond simplistic thinking about gender and power.

Start by getting people to list all the privileges that might be enjoyed by people in the room. These may be gender, class, race, age, able-bodiedness, straightness, membership of the dominant religion in that society, fluency in the first language that is the medium for the discussion. Arrive at eight dimensions of difference. Give everyone a piece of A4 paper and ask them to draw a large circle, and to draw lines across the circle that cut it into eight quadrants. Then ask them to draw another circle under the rim of the circle, with enough space to use the gap between the two circles to give each quadrant a label. Demonstrate this on a flip chart, assigning labels to each of the eight quadrants and asking the group to copy the diagram. Explain that they should write in at the centre of the circle those words that best represent the most privileged or powerful position – for example, in the 'gender' quadrant, 'male' might be at the centre, 'female' may be somewhere closer to the rim and 'transgender' might be closest to the rim.

Ask them to put a cross on each quadrant that best describes their identity: the further away from the centre their cross is, the less privileged they feel. Then ask them to draw lines joining them up. The closer the lines are to the middle, the more privilege people enjoy. People may never have experienced discrimination, but have also never really reflected on the privilege that has insulated them from this. Ask them to share their wheels with their neighbours and reflect on experiences where they felt excluded or discriminated against, and those in which they felt aware of their privilege. Then put all the wheels on the floor or on a large table, and convene the group to reflect on the exercise. Some may share their own experiences and reactions. Others may make more general observations. Use this as an opportunity to bring the discussion towards exploring the structures and relations of power that sustain privilege, and on the effects that privilege can have on those whose identities place them at the 'rim' of the power wheel.

The way this exercise works is not just by making the personal political. It is also by enabling people to 'see' the effects of any form of exclusion or discrimination on others, even when it may not have been something they themselves have ever experienced. For these and other reasons, it can be a very productive way of provoking reflection on what it might feel like to be excluded or discriminated against on the basis of gender – and for working from there back to thinking about how patriarchal power in institutions works with and reinforces these dynamics.

3 Interactions
3.1 Interaction diagramming

This technique is a simple visualisation of interactions in everyday work encounters involving a number of people of different genders, such as a meeting. It offers the means of making a map of the visible dynamics of power in the room; what it doesn't allow us to 'see' is what happens before and after the meeting, in which the exercise of power may be further consolidated. It is useful not only for understanding power, but also in enabling people to recognise aspects of their behaviour that may be otherwise hidden from them.

To practice this technique, take a piece of paper and sketch out on it a rough map of who is in the room, putting a cross or other symbol for each person. Then every time someone speaks, circle their symbol. Look at who they are directing their speech towards, and draw an arrow in that direction. You might also time their interventions. You can also use different thicknesses of lines or another code to indicate short and long speech acts. Use a symbol to record attempts to speak that were interrupted or aborted. Keep recording these interactions for the duration of the meeting. What you end up with is a schematic map of crosses that gives enough detail for people to recognise themselves, but is not sufficiently precise for them to be so readily identified by others. The result is a diagram that provides a crude device for mapping the occupancy of airtime and the directionality of interaction.

Displaying the diagram after a meeting ends can be a wake-up call to those who might not be aware of the extent to which they took up space, interrupted, failed to engage eye contact and otherwise dominated proceedings. It can be used more overtly to hold people to account, or less directly to display the interactions and gently encourage reflection. I've seen interaction diagrams used as a monitoring device, pinned up each day over the course of a three-day meeting, as a reminder to those in the room to think about who isn't being heard and whose voices dominate. Getting people to record their own interaction diagrams is also a technique that can keep the more dominant or garrulous occupied; and it can in itself act as a prompt to think about the frequency or length of interventions. Repeated use of this technique can, over time, serve as a means of encouraging reflexivity; whether this leads to changes in behaviour is, of course, conditional on the capacity of the individuals involved to act upon what they may be coming to recognise in themselves and others, and is not by any means guaranteed.

3.2 Telling tales

The process of crafting and sharing stories about everyday experiences can be a powerful way to bring into view the exercise of patriarchal privilege in an organisational setting. As such, stories can be used both as a way of cultivating attention, and as a way of generating awareness. Stories written and circulated, collated, broadcast and shared can be a medium through which episodes from institutional life can be narrated from perspectives that the powerful may never have even considered. The trick, of course, is to find a way that they become reading or listening matter. Setting a story-writing task, coupled with close observation, as an activity to complete between training sessions is one way of integrating it into training or other work with organisations on issues of gender and power. The organisation Gender at Work has used this to powerful effect (Rao *et al.* 2015).

I realised through experimenting with storytelling that there was some mileage in other acts of narration. I had emerged from one particularly difficult meeting steaming with annoyance. I turned to one of my closest and most sensitive male colleagues and began sounding off. I recounted the scene of the men in the corner muttering to each other every time a female colleague of ours began speaking and the frequency with which she was interrupted and cut out of the conversation. I bemoaned the tendency of another colleague to roll back into his chair in what I'd come to call 'classic patriarch pose' – hands behind or on top of his head, crotch thrust forward. And I drew his attention to the man who looked away every time there was any whiff of a prospect that he might be called upon to volunteer any of his time for any of the tasks the group needed to get done. He was amazed. He said he just hadn't noticed. But in the very next meeting, it was his intervention that stopped a dominator in his tracks, and that resulted in the glimmer of the beginning of an end to those frequent interruptions.

I narrated another meeting to another sympathetic male colleague, telling him a story that began long before we entered the room and continued

long afterwards, and included sartorial choices and covert pre-meeting phone calls to lobby so that I stood a chance of being heard if only by my points being made by a man. 'You do all this before a meeting?' he said. 'I just turn up.' He went on to comment on never having had the occasion to think about any of this. And then he began to reflect on what it meant to just turn up. I started using these acts of narration as a way of speaking about gender dynamics: not in generalities, but in stories from real life, ideally from shared experience, that could not only highlight the specifics, but also signal what worked – and what didn't – to change the dynamics. One of the practices that has come out of this is the deliberate use of a version of the 'patriarchal echo' to affirm a woman speaker, in a playful reversal of 'Miss Triggs' – the subject of a famous *Punch* cartoon that features a boardroom of men with a single woman, and the chair saying 'That's an excellent point, Miss Triggs. Now would one of the men here like to make it?' I came to deploy this 'echo' as a way to remind the room of the point made by the woman, bouncing it back into the discussion when the woman is otherwise being ignored. I recently read of this technique being used in the White House to 'amplify' the voices of women.

Told as stories, narrated from the perspective of the odd ones out – be they female, trans* or the kind of man who is persistently marginalised because they don't conform to dominant masculine styles – these kinds of episodes can be eye-openers to the men who take for granted the right to speak and be heard in this kind of arena. Reading the power dynamics of the room comes to be a practice that invites acts of resistance from those concerned to change those dynamics. Once men who 'just turn up' begin to realise what is going on in the play of power and privilege in the room, their interventions can help to change the dynamics, even and sometimes especially if it involves simply staying silent.

3.3 Dramatic interventions

Mention the word 'drama' and there is often a nervous current that runs around the room, as people prepare their excuses. 'Role play' is less threatening. 'Making up a little one-minute skit' is another way of putting it. Whatever language fits the setting, there is much that can be done by acting out patriarchal behaviour and looking for points of intervention. Augusto Boal and his Centre for the Theatre of the Oppressed in Rio developed a powerful array of theatre practices, from Forum Theatre to the Rainbow of Desire, to Legislative Theatre. I have used a combination of these practices to work with patriarchy in the workplace, as part of 'gender' and 'equality and diversity' training. It has worked equally well no matter what it is called.

Ask people to form a pair and discuss an experience in the workplace where they saw or experienced problematic patriarchal attitudes or behaviour. This can be in itself an interesting challenge: this exercise works best sequenced after a series of the earlier exercises. Then get them to join up with another pair, share their stories, and make up a version that has some of the elements of their original stories in it and that works as a credible, real-life story but isn't exactly the same

as anyone's individual story. That bit is important. This is not therapy. It's important to spell out the purpose of the exercise: for us to identify and work with some of the 'deep culture' in an organisation, surface it, inspect it, consider strategies for change and think about what we, as individuals and collectively, can do about it.

The small groups then rehearse their skits, and perform them one by one. With some of the skits, there are clear opportunities to intervene and change the action. I ask the actors to run through the skit again and those who are watching to clap if they can see something that can be done differently, stop the action, replace any of the characters and continue. This is sometimes immediately effective, and sometimes quite hilariously ineffective as the other characters continue in role. We then process what happened, including characters responding in role to how the intervention went down, what they were thinking and feeling, and so on. Other skits lend themselves better to considering rules, policies and ways of addressing what is going on through some kind of organisational change, so we spend time reflecting on what might be done. Others still are useful to stop at points in the action and to ask the characters to say what is going on in their heads at that moment, and how what is happening then and there is making them feel.

Processing these small pieces of theatre can generate a rich seam of reflection on the patriarchal dynamics that are so often viscerally part of organisational culture, even in apparently progressive organisations. From here, the discussion can be guided into actions that can be taken – ground-rules, policies, procedures or other forms of institutional intervention that can change the scene. Sequencing from the liminal play-world of drama into strategising for change gives people a set of reference points that can invite a much more inclusive, and deeper, conversation because of what people are able to *see* and *do*.

4 Conclusion

The methods described here are a smattering of ideas, borrowed, invented and adapted from others; there are many other similar activities that can do some of the work of dislodging and denaturalising that which is taken for granted, and that offer people opportunities to inspect their assumptions and the stuff of their everyday lives more closely. Critical reflection of this kind can generate important insights. This is usefully coupled with a process that takes these reflections and locates them within a broader, more structural, analysis of the materialities of privilege and power. The next step is to figure out how having 'undressed' patriarchy (Edström 2014), what is needed if we are to construct for ourselves and our organisations a more inclusive environment in which everyone can expect to be treated with dignity and respect.

This is not to say that the powerful are going to be enthusiastic participants in this process. Unsettling investments in patriarchal privilege calls for men – and also for the women who play a part in

sustaining patriarchy – to step back from a habitus that they may have never really brought into question and that has served to provide them with benefits. This stepping back isn't only about bringing gender into view; it needs to also 'undress' the complexities of intersectional difference, and its entailments. In international development arenas, with all their coloniality, critical reflection on Whiteness is a crucial dimension of this reflection. And there is much else: class privilege, for example, is a very evident part of an industry which recruits so many people from elites, South as well as North. Disability barely even summons lip service in international development. And sexuality continues to be uncomfortable terrain, even as international development's heteronormativity has come into question (Jolly 2011).

Ultimately, change calls for those men – and, by extension, people who are white, elite, able-bodied, straight – who currently enjoy a concentration of privilege, to give up their prerogative and cede space and power to others. By making visible some of the effects of power that sustain inequities, as well as showing how changing the current inequities that are sustained by patriarchal social orders can benefit us all, the seeds can be planted for these changes. Some of this is clearly a zero-sum game. But it is about more than this: it is about opening ourselves up to the possibility that others may see, feel and know very differently. And being open, too, to recognising that through this we might all find ourselves in a better place. For, as bell hooks writes:

> If men are to reclaim the essential goodness of male being, if they are to regain the space of openheartedness and emotional expressiveness that is the foundation of well-being, we must envision alternatives to patriarchal masculinity. We must all change (2004: 33).

Notes

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Why Citizens Don't Engage – Power, Poverty and *Civic Habitus*[*]

Jethro Pettit

Abstract Poor people have been recast by development agencies from 'beneficiaries' to 'engaged citizens' – yet the assumptions behind many democracy and accountability programmes remain simplistic. Power defines and constrains citizen engagement, which takes place against a backdrop of complex histories of exclusion, discrimination and violence. Poor people's access to income, services or benefits can rely on patronage relations which they may be wisely reluctant to challenge. Citizen engagement is thus shaped by *civic habitus*: the tacit collusion with socialised norms of power. This article draws on a study of civil society strengthening work by Swedish organisations and their partners around the world which illustrates the challenges posed by political cultures of passivity and questions the logic behind much human rights and democracy programming. The article offers useful frameworks for understanding how power affects citizen engagement and the formation of *civic habitus*, and explores the implications of this for more transformative approaches to citizen engagement.

Keywords: power, democracy, accountability, citizenship, discrimination, *civic habitus*, passivity, human rights, democracy.

1 Introduction

People living in poverty have been gradually re-cast, in the eyes of development agencies, from passive recipients of aid to citizens who should demand better government and public services (Gaventa and Barrett 2010). 'Beneficiaries' are now 'engaged citizens', but the thinking behind many democracy and governance programmes remains simplistic. Citizens and states are seen as demand- and supply-side actors who must learn to perform their roles more effectively to achieve accountability. More informed citizens must voice their concerns while state actors consult and respond to feedback. This liberal democratic ideal underpins the social contract of Western democracy and its promotion around the world; but a closer look at how power defines and constrains citizen engagement raises fundamental questions about this logic.

People who are marginalised and who live in poverty decide whether and how to be 'civic' against the backdrop of complex histories of

exclusion, discrimination and violence. Their survival and access to income, services or benefits often hinges on patronage relations which, if challenged, could cause them to lose what little they have and risk further exclusion. People don't simply 'choose' to become active as citizens – they assess the 'costs and consequences' of their choices (Kabeer 2001). Their actions as citizens are also shaped by embodied and socialised norms, more than reasoned calculation. Past encounters with oppression can constrain their options, as intimate and psychosocial experiences of exclusion limit their agency and induce compliance with power. Citizen engagement is shaped by what I would call *civic habitus* (after Bourdieu 1980): the tacit, rational collusion with socialised norms of power in order to survive and evade harm.

Scholars have long debated the operation of power in the public sphere: asking for example what produces a 'culture of silence' and oppression (Freire 1970); how 'willing compliance to domination' is secured via ideological manipulation (Lukes 1974: 10); why 'quiescence' can often prevail over 'rebellion' (Gaventa 1980); how everyday acts of resistance may be disguised as submission (Scott 1985, 1992); how institutions manifest 'disciplinary power' without coercion (Foucault 1991); how freedom is enabled or constrained by 'networks of social boundaries' (Hayward 2000); and how social dispositions become 'habitus' (Bourdieu 1980). These theories of power, while contested and often in tension, are vital to consider in any effort to understand or promote 'engaged citizenship'. The politics of voice and accountability cannot be explained as a political economy of competing interests without looking at how power is actually working 'below the waterline' (Pettit and Mejía Acosta 2014).

Civic habitus – defined here as the tacit and embodied collusion of citizens with forms of power pervading in the public sphere – raises questions about how active citizenship can best be stimulated. Better understanding is needed about how people's lived experiences of exclusion, trauma and survival affect their expressions of agency as citizens. This article draws on evidence from a study of civil society strengthening efforts by Swedish civil society organisations (CSOs) and their partners in Asia, Africa and Latin America which illustrates the particular challenges to citizens posed by political cultures of passivity and compliance. The study identifies barriers to citizen engagement and questions the logic behind much human rights, democracy and citizenship programming. Multiple dimensions of poverty, exclusion and power point to the need for more creative and transformative approaches to citizen engagement.

The article first shares the results of an inquiry into the multiple dimensions of poverty and exclusion, based on the Swedish civil society study (Pettit *et al.* 2015) which found that people living in poverty often collude with power rather than engaging as citizens to challenge it. Section 3 offers a conceptual framework for understanding how power affects citizen engagement in the public sphere, and how *civic*

habitus is created. Section 4 explores the implications of this for more transformative approaches to citizen engagement, with a focus on alternative methods of learning that can transform *civic habitus*.

2 Reality check: multiple dimensions of poverty and exclusion[1]

Poverty is usually defined by international aid programmes as a deficit – a lack of income, economic opportunity, assets, resources, access to education or health, etc. Development initiatives then aim to fulfil this deficit. The empowerment of people in poverty is often conceived in liberal terms as a process by which individuals can gain the resources, knowledge, opportunities and capacities they need to overcome their poverty or exclusion. Rights-based approaches go further, recognising structural and legal barriers, and the need to tackle vested interests and unjust laws. However, human rights are still posed as being in deficit, requiring awareness of them on the part of rights-holders and legal fulfilment by duty-bearers. Such liberal notions of citizenship, rights and obligations do not always consider the ways in which power excludes and shapes people's innate dispositions to uphold or resist those conditions (Sardenberg 2009).

Much development research shows that people experience poverty and marginalisation not as a collection of isolated, unconnected problems to overcome, such as how to obtain income, food, housing, health, education, security, etc. Such challenges are often defined 'from above' and as 'sectors' of intervention that neatly map onto aid priorities. In reality, poverty is experienced as a complex interaction of forces and barriers that defines the options available to people and shapes what they feel they can do to secure their needs and rights. A two-year research project looked at people's lived experiences of poverty and exclusion, and how this affects their engagement with civil society and public life. The study evaluated Sweden's strategy for strengthening civil society in developing countries through CSOs and their partners in Nicaragua, Pakistan and Uganda (Pettit *et al.* 2015). It found that people's day-to-day experiences of the multiple and intersecting dimensions of poverty and exclusion limits their agency and will to engage as citizens.

Using the Reality Check Approach (RCA),[2] teams of researchers in each country lived with households in marginalised communities for between three and five days, returning to stay with the same families a year later. Nine rural and urban sites were identified, three in each country. Our research team sought to better understand people's day-to-day realities, their perceptions of changes taking place, their own strategies for improving their living conditions, and whether and how they engaged with civil society and government. To reduce informant biases, the communities and families were not direct beneficiaries identified by organisations, but were purposively sampled. We also sought out the views and experiences of a range of actors in the communities beyond our host families. No questionnaires or interviews were conducted; rather we lived with people, listened, observed, conversed informally and shared in daily activities. In a further stage of research we explored the

activities and theories of change of civil society and other actors at the local and national levels, and compared these with people's realities. Our methodology was ethnographic and social constructivist, in contrast with more conventional evaluation methods (for details see Pettit *et al*. 2015).

The main challenges people faced varied by location and population groups, and included patterns of discrimination based on gender, age, ethnicity and disability; insecure access to land, employment, income and markets; violation of labour rights; vulnerability to climate-related disasters (drought and flooding); poor education and health services, and gender-based violence. We tried to understand people's survival strategies, and their perceptions and means of engaging (or not) as citizens at different levels. This included examining relationships within communities, formal and informal collective action, and people's expectations of and relations with local authorities, public service providers and civil society.

Evidence from all nine sites highlighted people's experiences of multiple dimensions of poverty and exclusion, and how these converged to pose both *external* constraints on the options they felt were available to them, and *internalised* constraints to do with their agency as citizens. The external forces were apparent in people's perceptions of their shrinking prospects for livelihoods and employment; an increasingly monetised world in which basic needs and services could only be met with cash; an increasingly commercialised public sector where health, education and other services must be paid for; a growing pressure to migrate in search of alternative sources of income; weakening familial, community and associational bonds; various forms of stigma and discrimination; and psychological stress and trauma.

These dimensions were often experienced by the individuals and families as a complex and intersecting web, which in turn contributed to *internalised* constraints to their agency observed in the form of stress, depression, despair and low self-esteem. Many people showed signs of undiagnosed and untreated trauma and mental illness generated by these multiple conditions, in addition to more overt domestic and/or political violence. This stress and trauma affected their ability to participate meaningfully in civil society or democratic politics because their agency and sense of options had been physically and psychologically constrained.

Our Reality Check visits exposed intimate and emotional dimensions of poverty and exclusion often missed by more conventional research focused on material or legal deficits. These psychosocial aspects became important as we tried to understand how people viewed and experienced civil society, participation and human rights. We observed that norms and identities that prescribe one's status and agency according to gender, sexuality, age, disability, class, race and ethnicity were socialised and reinforced through practices of *tacit compliance with power*. This included the perpetuation of patterns of patriarchy, patronage and clientelism, which further constrained people's expression of agency as citizens.

The relationships of power and patronage we observed call into question liberal expectations that better informed citizens will engage with government and duty-bearers to secure their rights. People's lived experiences often dissuaded them from making any such claims, as the fear of being ostracised and suffering reprisals put them at risk of losing what little access they had to services or assistance. In Uganda, as services became less reliable and accessible, people did not demand as much from government because their expectations had been lowered and there was little incentive to mobilise. Instead, they struggled to find resources to pay for private services, begged relatives and friends for welfare, and relied on patronage from traditional or political leaders (Scott-Villiers *et al.* 2015).

Compliance with patron–client relations as a means of securing basic needs was also observed in Nicaragua. Traditional and political leaders used their access to public or collective resources to dispense patronage and create dependencies by poor families. In the Atlantic Coast region, indigenous communities had gained autonomy over their land and natural resources. Yet individual families' rights to access and sell timber and other natural resources – which they relied upon to educate their children or to pay for urgent health care – was dispensed through patronage by local indigenous leaders. Some families had preferential access to these resources, but everyone 'benefited' just enough, stood a chance of benefiting, or were worried about losing everything if they objected, so the system itself was not challenged.

In all three countries we observed a clear difference between people's *awareness* of their rights and entitlements, and their *expectations* that participating as citizens would help them achieve their rights. In Pakistan and Uganda, ideals of citizen participation and of transparent and accountable government were familiar to people, but they had little real expectation of fulfilment. Many saw government decentralisation, for example, not as the democratic advance that was promised but as a decentralisation of unfair practices of discrimination, non-transparency and unaccountability from the central to the local level.

Given the dominance of patronage and poor people's reliance on it for survival, practices of participation, transparency and accountability tended to be performed in ways that complied with patron–client politics, rather than with liberal democratic ideals. At best, they were put into practice in ways that were a hybrid of both sets of norms, sometimes leading to contradictory outcomes. We found instances in which communities and CSOs were effectively combating these conditions by mobilising citizens to realise their rights, but many others where social mobilisation tended to reproduce existing patterns of patronage, dependency and discrimination. People had very low expectations that government would bring positive change, and in some cases the same applied to expectations of CSOs in general. Benefits from government or CSOs were often seen as gifts rather than entitlements.

Despite these perceptions of limited opportunities for change, we observed quite sophisticated strategies for survival. These included hard work, education, migration and organisation. Yet most of those we met were not 'engaged citizens' who took part in government or civil society to secure rights. Instead, they demonstrated 'rational passivity' towards state, voluntary and other actors, while conforming to the *status quo* of dependency and clientelist relationships.

As we tried to understand the presence or absence of citizen agency and people's participation in shaping the 'vibrant and pluralistic civil society' nobly aspired to by the Swedish strategy (Sida 2009), we found on the whole that psychological stresses and vulnerabilities, combined with high sensitivity to risks of challenging power and patronage, lead to passivity and compliance. Citizen agency was constrained not by lack of awareness or information, but lack of an enabling environment and reward for action, well-grounded fears of repercussion, and tacit acceptance of the way things are. In sum, the psychosocial effects of poverty and exclusion constrained people's ability to participate in civic and political life.

3 Power, passivity and *civic habitus*
The foregoing research findings demonstrate what citizen engagement is typically 'up against': the complex forces and experiences that constrain the civic agency of people living in poverty. These challenges point to the need for deeper theoretical understanding of power, passivity and compliance. This section explores theories of power that point the way toward alternative strategies of citizen engagement. The 'rational passivity' we observed can be explained as the learned behaviour and dispositions of 'political culture' which 'shapes what people expect of their political system, what they see as possibilities for their own action, and what rights and responsibilities the various actors are perceived to have' (Merrifield 2001: 7).

Many thinkers have tried to understand how political culture is shaped and transformed, beyond utility-driven notions of political economy, and to identify more precisely what leads people to conform with, resist or reimagine socialised dispositions of power. Here I review some of the ideas and debates about these informal and less visible dimensions of power, drawing on ideas from political sociology, social theory and neurobiology to understand compliance with power (what I'll call *civic habitus)* and its implications for citizen engagement.

3.1 Invisible power
How power works in the domain of politics and citizen participation has been widely disputed, perhaps most famously by Stephen Lukes (1974) who argued that the exercise of power is not always observable or marked by coercion or conflict. Responding to debates about who wins or loses in political decision-making, Lukes distinguishes three 'dimensions' of power, and argues that the first dimension (who prevails in observable conflicts and moments of decision-making) and the second (how power operates behind the scenes through the 'mobilisation

of bias') only partly explain how the 'willing consent to domination' is secured. The third and most insidious dimension of power, for Lukes, is the ideological shaping of people's beliefs and expectations, such that some conflicts never need to arise.

This 'radical view' of a third dimension of power tends to focus on the *deliberate* efforts of powerful actors to manipulate beliefs via ideology, education, religion, the media, etc. and is therefore an intentional 'power over'. Gaventa, inspired by Lukes, goes further in his articulation of 'a third form of power, in which conflict is more invisible, through internalisation of powerlessness, or through dominating ideologies, values and forms of behaviour' (Gaventa 2006: 29). This definition of 'invisible power' (also well articulated by VeneKlasen and Miller 2002) is not limited to intentional acts of domination, but can arise through self-reproducing processes in which all actors are conditioned by social and ideological norms, such as patriarchy.

3.2 Boundaries

Juxtaposed with this political sociology of power, and contesting it in academic debates, are broader sociological theories of power inspired by Foucault, Bourdieu and others. Hayward (1998, 2000) for example, draws on Foucault to challenge Lukes's 'third face of power' for its implicit assumption that power is held and wielded by actors – which she thinks obscures the effects of structure and discourse. She argues for 'de-facing power' and shifts attention from the power behaviour of actors to the 'networks of social boundaries' which affect *all* actors:

> Power's mechanisms are best conceived, not as instruments powerful agents use to prevent the powerless from acting freely, but rather as social boundaries that, together, define fields of action for all actors. Power defines fields of possibility. It facilitates and constrains social action (Hayward 1998: 12).

Hayward doesn't separate agency and structure but (like Foucault) sees them as mutually reproduced through social norms, identities and knowledge. Understanding and changing power thus becomes a task of recognising the social constraints to freedom, and people's differential abilities to influence these constraints (*ibid*.: 20). From this we can infer that taking action as a citizen involves gaining capacities for identifying and redefining social boundaries. Many boundaries are only partly visible, in the form of 'laws, rules, symbols, norms, customs, social identities, and standards which constrain and enable' (Hayward 2000: 30). These forces can be so subconscious and habituated that people don't necessarily know whether they are reproducing or resisting power through their actions.

3.3 *Habitus*

The idea of social boundaries helps to explain the presence and effects of power, but how are such limits internalised? Bourdieu's concepts of *habitus* and *field* suggest that we experience power in our bodies as well as our thoughts (1980). Power is a cultural and symbolic creation, constantly reaffirmed through an interplay of agency and structure. This happens

through the relationship between *habitus* – the practical, learned and subjective habits or dispositions that shape our behaviour, and *field* – the norms, standards and structures that prevail in a given environment. *Habitus* is neither a result of free will, nor is it determined by structures, but arises from interplay between them over time: dispositions are shaped by past events and structures, and at the same time shape current practices and structures, and even condition our very perceptions of these (Bourdieu 1984: 174). Such dispositions are created and reproduced not in a rational or intentional way but more unconsciously.

How does this explain passivity and compliance in civic and public life? Is *civic habitus* simply determined, or can it be shaped through conscious will and agency? When faced with the norms of a field we don't stop and 'reason through our actions based on an objective assessment of the outcomes' (Bourdieu 1980: 54), as rational choice and liberal theory would suggest. Rather, over time, we internalise 'objective conditions' of these structures in a subconscious and embodied way, as *habitus*, which regenerates structures. We tend to avoid doing or saying things that don't make practical 'common sense' within the confines of the field, and rationalise our behaviour around what is allowed or not allowed. While a rational and objectivist approach would assume that we can experiment with *all* possible actions and outcomes, *habitus* gives 'disproportionate weight to early experiences' that have shaped our rationality (*ibid.*), so we are innately constrained by our own history. Bourdieu illustrates this with the unsettling image of a train moving along while laying its own tracks ahead of itself.

Habitus is akin to Foucault's explanation of our physical embodiment of social conventions. The 'disciplinary power' of institutions such as schools and prisons need not rely upon coercion or punishment to make us behave as expected: we discipline ourselves, subjugating our bodies to what's considered acceptable (Foucault 1991). Foucault doesn't insist on there being some prior ideology or discourse *leading* to determined actions: embodied experience can come first and actually *create* the 'discursive practices' or 'bodies of knowledge' that define what is normal or deviant (*ibid.*). The body is thus central to the (re)production of power. This poses a challenge to rational–objectivist notions of cognition, agency and choice – where thought precedes and determines action – and casts doubt on liberal notions of citizen engagement.

More than a set of rules we follow, *habitus* is the full internalisation of social experience; it is the process by which normative responses are *physically inscribed in our bodies*. Bourdieu is not often cited for this aspect of his thinking, as it is easier to grasp the idea that *habitus* reflects cultural and ideological 'beliefs' in the symbolic realm. Yet it is through *habitus* that social relations are actually 'turned into muscular patterns and bodily automatisms… a way of bearing one's body, presenting it to others, moving it, making space for it, which gives the body its social physiognomy' or 'bodily hexis' (Bourdieu 1984: 474). The body thus works as a 'memory-jogger' with its 'complexes of gestures, postures and words… which have only to be slipped into, like a theatrical costume,

to awaken, by the evocative power of bodily mimesis, a universe of ready-made feelings and experiences' (*ibid*.). This 'bodily hexis' is akin to what neuroscientists have since called 'enactive' or 'embodied' cognition (Varela, Thompson and Rosch 1991), casting very similar doubts about Cartesian and objectivist notions of reason (Damasio 2006).

3.4 Embodied cognition

Boundaries and *habitus* work well together as a theory for understanding power and passive compliance, but they are *sociological* concepts for behaviour that is also *psychological* and *physiological*. To make practical use of these ideas, we need to know more about *how it is* that people learn to conform to boundaries and dispositions, and *what can be done*, if anything, to change this. If power is embodied, what does this mean for approaches to citizen engagement that emphasise rational modes of cognition? What are the limits of analytical forms of learning about citizen rights if large parts of our speech and behaviour are derived not from reason but from our experiential and habituated 'logic of practice' (Bourdieu 1980)? Can we use our senses and bodies more intentionally to unlearn and transform our *civic habitus*?

Invisible power, habitus, boundaries, discipline and other related explanations of power are consistent with notions of 'embodied cognition' from neurobiology (Varela *et al.* 1991; Damasio 2000, 2006), neurolinguistics (Johnson 1987; Lakoff and Johnson 1999), artificial intelligence (Clark 2008), psychology and neuro-philosophy (Gallagher 2005; Thompson 2007).[3] There has been a growing convergence of science and philosophy around the idea of the 'embodied' or 'enactive' consciousness, challenging Enlightenment binaries of mind vs body and reason vs feeling. Neurological perspectives on the somatic internalisation of experience invite the possibility of using multidimensional, affective and embodied approaches to citizen empowerment and engagement. Here space permits only a brief exploration drawing on one of these neuro-philosophical perspectives.

Contrary to objectivist models of cognition, we don't rationally plan our actions after evaluating and choosing from available options. Rather, we perceive, respond and improvise in a highly flexible way according to context and history; we are '*situated* agents, continually coming up with what to do…' (Varela 1999: 55). In studies of visual perception and action, Varela and his colleagues reject the 'computationalist tradition' in cognitive science, which assumes that sensory data is gathered and processed by a controlling centre somewhere in the mind, which then responds to an 'internal representation' of reality upon which it can act (*ibid.*: 54). The latest brain imaging techniques are unable to detect any such 'machine-like' processes of assembling and responding to sensory input, or any real 'centre' of cognition; instead, there are complex multidirectional networks of activity and feedback loops through which a coherent world emerges (*ibid*: 49). Our mind neither 'recovers' an objective outer world (realism), nor 'projects' an inner construct of the world (idealism), but instead functions via a process of 'mutual specification' which enables us to 'enact a world' (Varela *et al.* 1991: 172, 151).

This fascinating proposal sheds light on the possible workings of *habitus* – not surprising as both Varela and Bourdieu were influenced by Merleau-Ponty's studies of visual perception (1962). A social theory of how we embody and reproduce power (via *habitus)* is here supported by a neurobiological account of 'enactive cognition'. Both theories effectively reject the prevailing dualisms in Western philosophy of mind vs body, objective vs subjective, agency vs structure, inner vs outer, and perceiver vs environment. This 'turn' in cognitive science doesn't deny human agency, but it challenges long-held assumptions about individual autonomy, rationality and learning in Western thought.

Civic habitus can thus be understood as arising from a combination of the internalised beliefs of *invisible power* (Lukes 1974; Gaventa 2006)*,* the *networks of social boundaries* that enable and constrain freedom (Hayward 2000), the socialised dispositions of *habitus* (Bourdieu 1980) and processes of *embodied cognition* (Varela *et al.* 1991). These concepts help to explain why so often 'political socialisation operates below the radar screen' (Merrifield 2001: 10), and each concept illuminates a particular facet of citizen compliance with power in the public sphere. There is a risk of seeing *civic habitus* as a kind of determinism – which is why many are drawn to the idea that power is always perpetrated or resisted by actors. But *civic habitus* invites a deeper examination of the psychosocial processes of disempowerment. And it poses a challenge for those who wish to promote engaged citizenship: What kinds of strategies might support citizens to transform their *civic habitus*?

4 Conclusion: a transformative approach to citizen engagement
Civic habitus suggests that our bodies understand and enact power in ways that our conscious and analytical minds do not necessarily grasp. We have somatic and emotional reflexes that serve as living maps of our past encounters with norms of power, leading us to reproduce and comply with structures of domination. This creates a challenge for promoting citizenship, where many programmes operate on the logic of citizen education, popular communication, voice, mobilisation, and the spaces, mechanisms and technologies for transparency and accountability. While such activities can be very important, the theory of change behind them is often one of objective realism and individual autonomy – where better access to information and knowledge will produce citizen engagement. There is a somewhat blind faith in rational cognition and the expectation that voice and agency will automatically follow from it.

Underlying these approaches to engagement is a Cartesian notion of mind–body dualism in which action follows thought, and thought is the rational evaluation of costs and benefits. This view is not entirely wrong, as people do act in ways that they think will serve their interests or at least avoid harm. The 'rational passivity' we identified in the Swedish study showed that poor and marginalised people often choose to comply with power where the risks of challenging power are perceived to be high. Efforts to convince people of their 'true' interests and responsibilities as citizens will not go very far if the consequences of acting are too

harsh. As we found in the study, people were often very aware but were unwilling to act. This problem of 'quiescence' (Gaventa 1980) is further compounded where there is a *civic habitus* of compliance founded on a political culture of dependency and clientelism.

Traditions of critical adult learning would suggest that deeper and more transformative methods of awareness-raising are called for. These would not only expose the workings of power and discrimination (about which most poor and marginalised people are acutely aware), but reveal the filtration of this power into habituated ways of thinking and acting. Critical pedagogy aims to nurture abilities to name and challenge the workings of 'invisible power' (Gaventa 2006), to recognise and resist the 'social boundaries… that define fields of action' (Hayward 1998: 12), and to transform the subjective dispositions of *habitus* and normative structures of *field* (Bourdieu 1980). Yet there is a paradox when power also flows from *embodied cognition*. Critical pedagogy relies on rational analysis – albeit 'critical' reason – and a mind–body dualism is still assumed. Is the mind capable of transforming deeply embodied constructs and dispositions? Can we think our way out of invisible, habitual and embodied compliance with power?

A transformative approach to citizen engagement – one that can undo *civic habitus* – would include action learning processes that focus not only on critical reason and awareness, but would complement this with more reflexive, creative and embodied methods of learning and practice. These methods would draw on the imagination and envisioning of cultural change, and would use multidimensional methods of narrative, storytelling, visual and artistic expression, music, movement and theatre. Such creative methods can evoke more felt and experiential knowledge of the past and deeper re-imaginings of possible futures. Movement and theatre can surface and interrogate embodied experience, and engage participants in reinventing their habituated and physiological responses to power. Drawing, painting, photography, film and sculpture all offer powerfully visceral and aesthetic avenues of learning that can both enhance and transcend more conceptual and analytical methods of sense-making.

This is not a new proposal, but one that is sadly overlooked. Creative and narrative methods have been widely advocated in transformative approaches to participatory and action research (e.g. Heron and Reason 2008). Social movements have long drawn on forms of popular education and cultural expression using 'songs, poetry and theatre' and 'especially local cultural forms to give voice, pass on history and engender solidarity' (Merrifield 2001: 14–15). The theories of power reviewed here suggest that cultural action of this kind enables more than just symbolic and conceptual expressions of identity and struggle: it invites the possibility of more affective and embodied re-imaginations of power and social order, and so contributes to the transformation of *civic habitus* and political culture.

Creative and embodied approaches to learning all tap into the power of imagination, which – in keeping with notions of power and *civic habitus*

– has been considered central to processes of citizen empowerment. In contexts of socialised and internalised power, empowerment is much more likely to occur 'when individuals and organised groups are able to imagine their world differently' and can act upon that imagination (Eyben, Kabeer and Cornwall 2008: 6). Creativity and art feed imagination, which 'gives us images of the possible that provide a platform for seeing the actual, and seeing the actual freshly… we can do something about creating what lies beyond it' (Eisner 2002: 4). The power of the imagination is also recognised in creative approaches to professional development because it occupies the 'potential space' between past and future and offers 'the possibility of being transformed' (Hunt and Sampson 2006: 7).

These creative and embodied forms of learning provide *different ways of generalising from the particular* than those offered by conceptual analysis. They can hold open our lived experience of power to more immediate forms of apprehension, without jumping too quickly into abstract thinking, or allowing symbolic representations to *substitute* for embodied understanding and knowledge. This approach doesn't reject the power of the intellect and critical consciousness, but brings them into balance with other ways of knowing, integrating them with creative expressions of our somatic encounters with power. Such approaches have the potential to transcend simplistic liberal notions of citizen engagement based on rational choice and utility and to enable more enactive and imaginative forms of citizen agency capable of transforming the socialised norms and political cultures that induce compliance with power.

Notes
* A longer version of this article appears as a chapter (Pettit 2016) in Skinner *et al.* (2016).
1 This section draws substantially on the Swedish civil society strategy evaluation report authored by Pettit *et al.* (2015) and the fieldwork and analysis of the country evaluation teams in Nicaragua, Pakistan and Uganda, to whom I am indebted for these findings.
2 See Lewis and Jupp (2012) and www.reality-check-approach.com.
3 Many explanations of embodiment, including those of Bourdieu and Foucault, have been influenced by the continental philosophy of phenomenology, particularly the work of Husserl and Merleau-Ponty, who was one of the first to link phenomenology and sociological theory with cognitive science. Varela *et al.* (1991) are also influenced by Buddhist philosophies of consciousness.

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Power and Empowerment Meet Resistance: A Critical, Action-Oriented Review of the Literature

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Abstract This article reviews recent literature relating resistance studies to power studies, seeking insights that can be applied by change practitioners and social activists. Starting by critically revisiting the purpose and evolution of power analysis with the hindsight that comes from two decades of scholarship and practice, it shows how the transformative potential of power analysis is currently constrained in important respects. The coverage of power theory in the resistance literature is found to be promising but patchy. Agency-based, coercive and wilful versions of power as 'power over' tend – with noteworthy exceptions – to be more accessible and tractable to power and resistance scholars and strategists alike than the less accessible structuralist and post-structuralist versions of power as norms, culture and discourse, or processes of structuration. The article therefore proposes a broader framing of power analysis, and makes a start at extending its application beyond strategising for empowerment to strategising for resistance.

Keywords: power, power analysis, power theory.

1 Introduction
It is time to take a critical look at power analysis and see whether it is being used to its full potential. As a member of the Institute of Development Studies (IDS) Power and Popular Politics cluster, I have worked with colleagues over the last decade to apply understandings of power through teaching, training and use in the design and management of development and social change programmes. Common approaches to power analysis seem sometimes to fall short of the breadth of manifestations of power that we have encountered in practice, and of people's responses to it. The last decade of social science research has produced several exploratory forays by resistance scholars into the field of power studies, raising the question of whether there is scope for power analysis to help in strategising not only for empowerment but also for resistance, and what that might look like.

This article reviews recent literature relating resistance studies to power studies, assessing its coverage in terms of the range of ways power is understood and apprehended by contemporary social justice advocates and actors, and exploring how insights from these conversations might inform activism. It is more of a literature review than an empirical piece, but is action-oriented in two respects. First, it is informed by my recent empirical work on 'invisible power' – power which is structural or lies in the interplay between agency and structure, taking form in socially embedded norms, values and practices (McGee 2016) – and seeks to provide insights for those resisting and contesting this 'most insidious' (Lukes 1974: 27) form of power. Second, I take it that the point of conceptualising power and how it relates to different actors is so as to better understand the social processes surrounding these actors, and ultimately, to contribute to more effective engagement by activists in contemporary social justice struggles.[1]

In the next section I position power analysis as an approach in need of a critical revisit. I go on to review literature from resistance studies and power studies which relate one field to the other at conceptual and theoretical levels, and come to a view on its coverage and gaps, including its applicability to practice. I then compare the concepts of empowerment and resistance; and conclude by reflecting on some implications and questions arising for social activism and practice.

2 Power analysis: a refresher

I frame the article by offering here a brief and partial revisit and reappraisal of power, focusing on two questions: (1) why do power analysis? and (2) what has happened to it over the last two decades?

The bundle of analytical approaches and tools popularised among activists as 'power analysis' since the early 2000s (VeneKlasen and Miller 2002; Gaventa 2006) has grown out of the North American political science tradition of 'power structure research' in the 1960s and 1970s (John Gaventa, pers. comm.), and also owes much to feminist studies and feminist advocacy (Rowlands 1997; VeneKlasen and Miller 2002). Essentially, power analysis is a way to understand the nature of power and power relations. It consists of applying a set of overlapping and interacting analytical lenses to help one to understand that power is at play and categorise it – in terms of expressions (over, to, with, within), realms (public, private, intimate), levels (household, local, national, transnational, global), forms or faces (visible, hidden, invisible), as well as dimensions such as agency and structure, intention and consciousness.

Power analysis might be done as an intellectual or a practical pursuit, or a mixture of the two. On the practical side, power scholars and social justice advocates within the social change and international development fields find that analysing existing configurations of power helps in devising ways to neutralise, counteract or transform them. They have used power analysis to conceive, plan or evaluate efforts to shift power relations between concrete actors in specific contexts.

By 2002, according to Just Associates (JASS), 'experts and practitioners in the fields of conflict resolution and democracy-building increasingly stress[ed] the importance of incorporating power into their analysis and actions' (VeneKlasen and Miller 2002: 39). In 2006 the Participation, Power and Social Change team at IDS published a range of current work on analyses and practices of power in international development and the entry points for change (Eyben, Harris and Pettit 2006). A few years later, a workshop on 'power analysis in practice' at IDS in June 2009 gave rise to the Powercube website,[2] a rich resource for understanding power relations in efforts to bring about social change, and a curated repository of reflective practitioners' experiences. Work by JASS and IDS along with a range of non-governmental development, advocacy and change organisations[3] to develop and apply power analysis in the development field have in common an explicit and practical commitment to socially progressive change as an end, and to power analysis as a means to that end.

At the opposite end of the continuum, among other political science and political sociology treatises on power are several analyses of different forms of power undertaken by resistance scholars of various social science disciplines. Some of these use power analysis as an instrument to help them develop conceptually and theoretically the newer field of resistance studies (Vinthagen 2007; Vinthagen and Johansson 2013; Johansson and Vinthagen 2014; Lilja, Baaz and Vinthagen 2013; Lilja and Vinthagen 2014). Others (Lilja *et al.* 2013; Hoffman 1999) start from the premise that the point of resistance studies is to better understand power and challenge existing power relations, following Foucault's dictum that resistance can be used 'as a chemical catalyst so as to bring to light power relations, locate their position, and find out their point of application and the methods used' (Foucault 1982: 208, 211).

But although power analysis has been used and developed by social justice activists and advocates to strategise for empowerment (Pantazidou 2012), its transformative potential has been constrained in at least two important respects. The social sciences have been dominated for decades by rational choice theory and analytical approaches derived from it. This has cast a long shadow over understandings of social, political and institutional realities. In the view of many non-economist social scientists and even some economists, rational choice theory and its derivative political economy analysis (PEA) offer an ethnocentric, partial or incomplete account of what motivates individual and collective attitudes and behaviours. In relation to power, Pettit (2013: 15) shows how PEA is ill suited to understanding what goes on 'below the waterline' – at the less visible level of informal norms, beliefs and practices and the interplay between structure and agency. Some resistance scholars have highlighted how rational choice theory fails to capture the wide range of strategies and reasons behind performances of power and resistance, pointing to the limitations of universal notions of the 'rational' for understanding episodes of resistance and using Foucaultian power theory instead (Lilja *et al.* 2013: 204–5). In some quarters of the international

development and aid field too, rational choice-based approaches have come under question, including in recent critiques of the dominant formulae for securing accountable governance through stimulating citizen engagement and bottom-up social change (Pettit *et al.* 2015; Pettit, this *IDS Bulletin*; Fox 2014). For understanding power, power analysis and PEA each have merits and limitations, and the two are best seen not as interchangeable but as alternatives for different, specific, purposes, or as potentially complementary (Mejía Acosta and Pettit 2013; Pettit and Mejía Acosta 2014). Yet overall, in the social sciences, public administration and development studies fields, if not in the realm of social activism, PEA remains much better known and more widely applied than power analysis.

Simultaneously, although reflective practitioners have been careful to contextualise the visually appealing, conceptually simplifying 'power tools' they use within sound social and political theory, and to caution against simplistic, reflex application of devices such as the 'power cube' (Gaventa 2006),[4] 'power analysis' has become all too readily understood as widgets – faces, levels, tools, cube – for unpacking agency-based varieties of coercion. By this, I mean that they treat power as intentional agency and as coercion, focusing on how power is exercised by one actor to constrain or direct the agency of another. To be sure, these artefacts provide excellent entry points for conversation and critique of power in social realities and an introduction to political and sociological theory on power. But the 'essentially contested' (Lukes 1974: 137) phenomenon of power soon escapes the confines of simplified binary and trinary metaphors. A set of richly textured yet less accessible structuralist and post-structuralist accounts of power as norms, culture and discourse, associated with Foucault, Bourdieu and Hayward (Navarro 2006; Hayward 1998, 2000), although addressed in theoretical work (e.g. Lilja *et al.* 2013; Johansson and Vinthagen 2014; Mitchell 1990; Navarro 2006), tend to get marginalised from applied research on power, in favour of those more accessible agency-based, coercive and wilful versions of power as 'power over'. Left out of the picture, too, is structuration. Giddens's way of understanding how society works as a continuous interplay of agency and structure is to posit that society is in a continuous process of 'structuration', with human actions simultaneously structuring society and being structured by it (Giddens 1984). It has been built on by Haugaard (2003) to construct a theory of social order based on structuration and 'confirming-structuration' practices in the exercise and contestation of power: this too lies beyond the scope of common usage of power analysis.

Power analysis is more than promoting widgets that distinguish between varieties of wilful power. The shades of meaning and subtle differences between all the theoretical takes on the various apprehensions of structural and invisible power equally merit analysis. Overall, power analysis offers not a more simplified, reduced account of a given reality than the naked eye or PEA, but a deeper, more complicated one that is more complex to resolve. This promise to complexify rather than

simplify, inherent in the paradigmatic origins of power analysis in the realms of critical realism and social constructivism[5] – contrasting with those of PEA and rational choice theory, which lie in positivism – has probably limited its appeal and uptake.

With these reflections on the current state of power analysis in mind, and a commitment to exploring less common or untried applications, in Section 3 I review literature which relates resistance studies to power studies.

3 Resistance meets power

Whether one agrees with Foucault that 'where there is power, there is resistance' (Foucault 1978: 95–6) or accepts only Hoffman's more qualified reformulation that 'where there is resistance, there is power' (1999: 674), the exploratory conversations now taking place between resistance studies and power theory or power studies are to be expected and encouraged. They afford deeper understanding of these two sets of concepts and approaches, while also begging the more specific question of how 'resistance' relates to 'empowerment', a concept that power practitioners and to some extent power scholars use (diversely) to denote challenges to existing power relations.

James C. Scott's major works expounding his theory of 'everyday resistance' predate the naming of today's field of 'resistance studies', but are clearly the first major works to relate different forms of resistance to different forms of power and attempt to systematise these relationships (Johansson and Vinthagen 2014). In referring to the variety of forms of resistance as a 'mirror image of the variety of forms of *appropriation*' (Scott 1989: 37, my emphasis), Scott locates his power interest as 'power over', power as domination. In sketching how three 'forms of domination' correspond to 'forms of disguised resistance', he offers 'Material domination – Everyday resistance', 'Denial of status – Hidden transcript of anger, aggression and a discourse of dignity', and 'Ideological domination – Development of dissident subculture' (*ibid*.: 55–6). Thus, Scott does recognise non-material forms of power, and 'hidden' and 'invisible' power as well as visible. He acknowledges 'ideological domination', a form often manifest structurally through the shaping of values, beliefs and norms. Even while focusing on 'power over', power as coercive agency – one actor exercising power to coerce or manipulate another – he recognises that the way this happens is sometimes via hegemonic control over the other's ideas and norms (a Gramscian view, taken forward by Lukes). He also critiques Gaventa's work on 'powerlessness', arguing that power is never completely dominating and resistance is never completely absent, however much it eludes observation (Gaventa 1980; Scott 1990).

'Everyday resistance' as conceived by Scott is all about forms of agency that offer 'disguised' resistance to both visible and less visible forms of domination; other terms Scott uses are 'masked', 'invisible' and 'tacit'. Because it happens unnoticed under a veneer of compliance with the dominant coercive order, each act of everyday resistance 'discursively

affirms that order' and 'leaves dominant symbolic structures intact' (Scott 1989: 57). However, over time everyday resistance '[exerts] a constant pressure' (*ibid.*: 59), and eventually norms get changed through the defiance and delegitimation it entails.

In later work, Scott (1990) continues to treat power as essentially agential and coercive, while allowing that in 'public transcripts' it is manifest in structural forms. Scott's concepts of 'hidden transcripts' and 'infrapolitics' or low-profile undisclosed resistance to ideological domination (*ibid.*: 198) are all about what power analysts would call the 'power to' reject domination and the 'power with' of sharing grievances and cooperating with fellow subordinates. In the power literature, today's concept of 'invisible power' has emerged gradually from Lukes's (1974) identification of thought-control and compliance with domination as the 'third dimension' of power and Gaventa's further theorisation of this as the internalisation of powerlessness 'instilled historically through repeated experiences of failure' (1980: 254). Later, in VeneKlasen and Miller's work (2002), that invisible power was framed as something tractable, to be confronted using specific consciousness-raising, advocacy and change strategies of the 'power within' and 'power with' varieties (Miller *et al.* 2006). These formulations advocate '[c]hange strategies to counter invisible power [by targeting] social and political culture [and making] alternative values and worldviews alive and visible' (*ibid.*: 10) – essentially, and not in so many words, they advocate the strategic use of 'invisible power' as a weapon or resource the weak can use against the relatively more powerful in a consciously counter-hegemonic way.

Mitchell (1990) critiques most past work on power and resistance, including Scott's, because of its basis in a dualist ontological conception which assumes an opposition between a material or physical realm (the objective dimension of coercion and the physical self), and a realm of consciousness or mental realm (the subjective dimensions of ideas, consciousness and beliefs). Scott's *Weapons of the Weak*, Mitchell argues, 'aims to discover whether power works by persuading peasants' minds of its legitimacy, or by coercing their actions' (1985: 548) – that is, whether it is only the *behaviour* of non-elites that is subjected to power or also their *consciousness*, through hegemony. He argues that this overly dualist starting point – which is evident also in Lukes's (1974) mainly agential construal of the third of his three dimensions of power – invalidates many of Scott's propositions and conclusions: '[T]he complexities of domination never quite fit the terms of the opposition between a physical and mental form of power' (*ibid.*: 573).

As a corrective to this dualism, Mitchell points to Bourdieu's approach to power. Instead of assuming opposition between physical (potentially violent) coercion and voluntary acceptance of an ideology, Bourdieu understands power as 'symbolic violence', 'exercised upon a social agent with his or her complicity' (Wacquant and Bourdieu 1992: 167). Symbolic violence is 'intrinsically equivocal', and arises from the

inseparability of practice and ideology. It captures Bourdieu's notion that sustained coercion can actually only take place disguised as voluntary acceptance, as a 'gentle, invisible form of violence, which is never recognised as such, and is not so much undergone as chosen' (Mitchell 1990: 551, citing Bourdieu's *Outline of a Theory of Practice*). In this interpretation, far from being a distinct mode of operation of power, coercive power is enmeshed with persuasion or voluntary acceptance, and the dualisms of behaviour/consciousness, material/ideological, lose their validity. Mitchell gives equally short shrift to resistance theorists' debates about the rationality or otherwise of instances of resistance (and by implication, to rational choice theorists). 'Rationality', he points out, is highly situated and experientially defined.

Mitchell's contribution to theorising the relationship between resistance and power is to debunk ontological dualism and the dualist conceptions of power and resistance that go with it, clearing the way for more holistic versions. His arguments have important implications for power analysis: the clumsy dualisms of structure/agency, intentional/unintentional, recognised/unrecognised should be left behind and the differentiation of invisible power from visible and hidden power should be de-emphasised, giving way to contextualised, detailed, perceptive apprehensions of instantiations of power and resistance as people encounter and observe them, rather than as social theory theorises them.

Hollander and Einwohner (2004) set out to 'conceptualise resistance', starting from an understanding that this is a social action involving agency and performed in an oppositional relationship to power. They identify two key defining features: recognition and intentionality. The importance attached to intentionality arises from Scott's observation that outcomes are a poor way to understand acts of resistance because in practice acts intended to constitute resistance often fail. Recognition is a central issue because some resistant acts are designed to be recognisable and others are designed not to be. Hollander and Einwohner unpack these issues through setting out the diversity of 'resistance' – in their treatment, always an action – in terms of its targets, its direction or goals, and whether it is a political or an identity-based action. They identify seven distinct 'types of resistance' (*ibid.*: 547). Key to the concept of resistance, in their view, are its complex and socially constructed nature and its interactional relationship with power. Although they do not explicitly define it, they take power to be domination, and about agency – one actor exercising it over another.

One implication of their argument and their exclusive focus on actions and agents is to eclipse cases where the target of resistance is a faceless, de-personal non-agent. In instances of power as 'everywhere' (Foucault), 'a network of social boundaries' (Hayward) or habituation of social dispositions (Bourdieu), responses to it are less likely to be intended as resistance, or even if intended, might be unrecognisable as such, so according to the narrowest definitions would not count as resistance.

Aspects of Hollander and Einwohner's framework are critiqued in turn by Johansson and Vinthagen (2014). They take the broader perspective that 'everyday resistance is a *practice* […] historically *entangled* with (everyday) power […], needs to be understood as *intersectional* with the powers it engages with (not one single power relation); and [is] *heterogeneous and contingent* due to changing contexts and situations' (*ibid.*: 2). Taking resistance to be agency, they explore questions of where, when, by whom and how it occurs. Their perspective emphasises a more fluid, ongoing and open process in contrast with Scott's or Hollander and Einwohner's visions in which certain acts of resistance are treated rather mechanically or compartmentally as responses to certain types of domination. Building on Chin and Mittelman's earlier conceptualisation of resistance to globalisation – a process which represents new forms of power and calls up new forms of resistance – they propose a framework for analysing the interplay of power/ resistance, with four dimensions: repertoires of everyday resistance; relationships of agents; spatialisation; and temporalisation (1997: 3). In treating power in the Foucaultian sense as 'ubiquitous rather than located in certain groups; productive rather than merely repressive, and relationship rather than reified' (Johansson and Vinthagen 2014: 4), they depart from the more rigid structuralist and Marxist categories that inform Scott's analysis of power/resistance. Even so, Johansson and Vinthagen's perspective does not explicitly extend to the least visible, least agential interpretations of 'invisible power'.

What we have in Scott (1985, 1989, 1990), Mitchell (1990), Hollander and Einwohner (2004), Lilja *et al.* (2013), and Johansson and Vinthagen (2014) is a series of evolving and increasingly refined frames for resistance analysis derived from various political and sociological traditions and epistemological and empirical standpoints. From Scott onwards, resistance has been understood as a range of agency-based responses to power (or domination), but over time, the understandings of power informing these evolving perspectives on resistance have become less structural, more post-structural, and implicitly or potentially, open to notions of structuration. The resistance scholars have generally favoured continuum- or spectrum-based, relativist typologies, rather than the binary, trinary and dyadic frames of the 'power structure researchers'.

What is left out of the current scholarship on the relationships between resistance studies and power studies? Oriented towards conceptualisation and theory-building for resistance studies as a relatively new field, it is nonetheless far from exhaustive in its engagement with power theory. Gramsci's, Foucault's and Bourdieu's interpretations of power have been explicitly addressed in the later analyses of power/resistance, but nowhere have I found reference to the perspectives on power on which contemporary power analysis is founded: Lukes's (1974), Gaventa's (1980, 2006), VeneKlasen and Miller's (2002). Hayward's contestation of 'invisible power' as wilful domination, and reframing of it as 'a network of boundaries that delimit […] what is socially possible' (2000: 3) is not addressed. Neither are the constitutive aspects of power as theorised by

Haugaard (2003). Existing resistance scholarship does not explicitly engage with structuration theory, but to some extent differentiates structural from agency-based understandings of power and makes some statements that imply structuration relationships and dynamics between initial power, resistance to it, power adapting in response, and resistance to that.

The work reviewed, being primarily theoretical-conceptual, has focused heavily on building frameworks for understanding, based on the deconstruction of key sociological debates about power (coercion vs persuasion; material vs ideological; intention and recognition). There is room to extrapolate from its theoretical and conceptual offerings to explore their potential or actual applications to practice, including questions of how social actors can respond strategically and effectively to problematic power relations and manage to shift power relations.

4 Empowerment meets resistance

Power/resistance debates have been more descriptive and conceptual than prescriptive and action-oriented. They have offered a range of understandings of the relationships between power/resistance, shifting over time from discussing power as 'power over' (Scott's domination and coercion), to Gramscian and Foucaultian understandings of power as hegemony (power over and power to, persuasion rather than physical coercion; diffuse and ubiquitous conditioning) and in just one case moving on to engage with the more structuration-oriented perspective of Bourdieu (Mitchell 1990). Therefore, while they tell us something about the nature of resistance to 'power as a contest of human agency',[6] they have less to say on power understood as 'underlying social structures or broader historical, social and cultural forces that shape […] actors and their ways of relating or acting'.[7] Also, from the perspective of what resistance scholars call subalterns and power analysts call powerless or marginalised people, these debates have shed little light on what to do about the power relations that constrain these actors' sense and practice of agency and structuration.

The literature on empowerment, conversely, is born of a preoccupation with what the relatively powerless and marginalised can *do* − or sometimes, more controversially, with what others can do on their behalf. Much empowerment analysis as presently practised comes from the women's empowerment movement. By helping to label visible, hidden and invisible faces or expressions of power, distinguish power over from power to, with and within, and pinpoint the loci and interrelationships of power between the public, private and intimate domains, this body of work helps establish appropriate strategies for reconfiguring interests and positions so as to shift power in a given instance and context.

What about the phenomena of resistance and empowerment themselves? What are the differences, similarities and the overlaps between them? To what extent is strategising for resistance the same as strategising for empowerment? And if power analysis is currently used to some extent in strategising for empowerment and hardly at all in

strategising for resistance (as distinct from conceptualising resistance), is it being used to its full potential?

In views of power limited to 'power as agency' and 'power over', empowerment is about altering relative positions in power relationships in favour of the relatively powerless, or – very rarely – as weakening the dominant (Fox 2005, 2007), so that the relatively powerless can prevail, winning over the once powerful or dominant. However, for many scholars, power is better understood as also 'power to', 'with' and 'within'; as structural as well as agency-based (Hayward and Lukes 2008) and, by some, as involving structuration (Giddens 1984) and 'confirming-structuration' (Haugaard 2003). 'Subaltern' and feminist agency have been acknowledged and well explored, and power is seen as intersectional in nature.

As lenses on power broaden to include 'power as structure', and power to, power with and power within, understandings of empowerment also broaden. A crucial distinction is between 'liberal' and 'liberating empowerment' (Sardenberg 2009). While liberal views adhere to an individualist, materialist form of (usually economic) empowerment, within the 'liberating' camp emerging from feminist thought and Freirean conscientisation, empowerment is understood as involving first a stage of recognising existing power relations and oneself within them, and then a stage of conceiving and undertaking action to change them. In Sardenberg's words, the process 'involves the development of "power with", a notion implicit in "consciousness-raising" as a means of "empowerment", and thus as a political strategy for change' (*ibid.*: 11). Freed from the notion of power as a zero-sum game or as associated with liberal individualism, empowerment can happen or be pursued whatever the 'power' and whoever the 'powerful' in question, and can happen in forms and spaces relatively disconnected from these. An actor can become empowered in relation to a (structural) set of social norms through processes that do not engage the powerful actor in question, nor invoke the structural power in question. Empowerment is a process of agency and structuration. While it is relative to a former situation, it is not necessarily relational, in the sense that it does not need to be done 'against' anything or anyone – a quality summed up by Hayward and Lukes as 'Nobody to shoot'.[8] In a recent influential definition, 'Empowerment happens when individuals and organised groups are able to imagine their world differently and to realise that vision by changing the relations of power that have been keeping them in poverty' (Eyben, Kabeer and Cornwall 2008: 6).

Resistance, like these contemporary understandings of empowerment, is also a process of agency and structuration. However, rather than shifting power, creating power or wresting 'power over' from another actor, resistance holds out against power, withstanding and countering its effects, which may entail overcoming it but not necessarily, and may entail just sitting it out. Like empowerment, it may be a response to any form of power. Unlike empowerment, it is an essentially relational concept: with resistance, there is always something or someone to resist.

5 Conclusion

Clearly, in any given instance resistance is shaped by power. But, in order to get more practical use from understandings of resistance and the practice of power analysis, an answer is needed to the question posed by Lilja *et al.*: '[H]ow does [resistance] undermine power?' (2013: 209). Resisting someone or their intentions may seem relatively clear-cut; but what about resisting power in the form of ideological domination or hegemony, persuasion, manipulation of viewpoints, or

Table 1 Invisible power and resistance matrix

Mechanisms	Examples	Responses and strategies	
Through which dimensions of power over operate to exclude and privilege	*Power over*	*Power with, within, to*	*Resistance*
Invisible: shaping meaning, values and what's 'normal' Socialisation and control of information: Cultural norms, values, practices, ideologies and customs shape people's understanding of their needs, rights, roles, possibilities and actions in ways that prevent effective action for change, reinforce privilege-inferiority, blame the victim and 'manufactures consent'. Dominant ideologies include neoliberalism, consumerism and corporate capitalism, patriarchy-sexism, racism, etc. Key information is kept secret to prevent action and safeguard those in power and their interests.	**Socialisation/oppression** 1. Belief systems such as patriarchy and racism cause people to internalise feelings of powerlessness, shame, anger, hostility, apathy, distrust, lack of worthiness, etc. especially for women, racial-ethnic minorities, immigrants, working class, poor, youth, gay/lesbian groups, etc. 2. Dominant ideologies, stereotypes in 'popular' culture, education and media reinforce bias combined with lack of information/knowledge that inhibits the ability to question, resist and participate in change. Examples: Women blame themselves for domestic abuse; poor farmers blame themselves for their poverty despite unequal access to global markets or decent prices or wages; crucial information is misrepresented, concealed or inaccessible (e.g. WMDs and Iraq).	**Building individual and collective power** Popular education, empowerment, new knowledge, values and critical thinking tied to organising, leadership and consciousness for building confidence, collaboration, political awareness and a sense of rights/responsibilities/ citizenship which includes such strategies as: sharing stories, speaking out and connecting with others, affirming resistance, analysing power and values, linking concrete problems to rights, etc. Doing action research, investigations and dissemination of concealed information and also using alternative media, etc.	**Contesting meanings and models of behaviour to reshape the boundaries of what is socially possible** Collective creation of spaces for social interaction with consciously different (non-hierarchical, non-patriarchal, horizontal, democratic, peaceful, humanising) cultures and rules of access and conduct, defined collectively on the basis of critical analysis of dominant culture in 'normal' spaces. Instead of adopting dominant language that expresses and normalises the dominant *status quo* through desensitising euphemisms and metaphors, use of alternative lexicon that avoids or unmasks euphemism and names frankly the boundaries experienced. Seeking opportunities to delegitimise the social boundaries in place, by withholding confirmation or affirmation of them, ignoring or circumventing rather than observing them, etc.

Source Author's adaptation from Miller *et al.* (2006: 11).[12]

the imposition of norms and behaviours? How does one resist a network of boundaries that limits what is socially possible?

Scott asserts: 'Inasmuch as every act of compliance with a normative order discursively affirms that order, while every public act of repudiation […] represents a threat to that norm, everyday resistance leaves dominant symbolic structures intact' (1989: 57). Yet, he goes on, 'everyday resistance may be thought of as exerting a constant pressure, probing for weak points in the defences of antagonists, and testing the limits of resistance' (*ibid.*: 58–9). Resistance gains ground inch by defiant inch: norms get changed through defiance and legitimation. 'If [a particularly intrepid remark by a subordinate] is not rebuked or punished, others, profiting from the example, will venture across the line as well, and a new *de facto* line is created, governing what may be said and gestured' (*ibid.*: 59).

Power analysis, even in its constrained forms, has helped social activists and change agents to lay bare visible, hidden and invisible faces or expressions of power, distinguish power over from power to, with and within, locate power in intimate, private or public realms and in the connections and disjunctures between these.[9] A number of tools and frames have helped activists to lay the foundations of appropriate empowerment strategies in given contexts. This strategic and practical value is usefully demonstrated by Miller *et al.* (2006: 11) in their 'Power Matrix', where invisible power as a form of 'power over' is exemplified in various forms of socialisation and oppression and a range of ways to construct power with, power within and power to are offered as 'Responses and Strategies' to these.[10] More could still be done, though, to derive practical tactics and strategies from the broader range of power and resistance scholarship discussed above.

Following Hayward and 'de-facing' invisible power to reframe it as 'a network of boundaries that delimit […] what is socially possible', the 'invisible power' row of their matrix can be expanded with a fourth column focusing on resistance, as shown in Table 1.[11]

Resistant behaviour can delegitimise the dominant or powerful and their norms and behaviours, and can construct legitimacy for alternative norms and behaviours. In a setting where dominant behaviours, attitudes and norms have become normalised over decades through material and fear-based coercion and later through intergenerational transmission mechanisms, in refusing to be complicit with these, people may ostensibly be leaving those structures intact, but they are refusing to affirm or adopt them.[13] However low key and small scale, these acts are contestational in meaning; by contesting them morally and ideologically, if not materially, they contribute to undermining them. Empowerment might be an ill-fitting term for these agential responses to unfair power in settings where the actors in question live in fear, but they certainly constitute resistance.

If empowerment begins 'when individuals and organised groups are able to imagine their world differently' (Eyben *et al*. 2008: 6), and if no system of power has been constructed capable of fully extinguishing such imagination (Scott 1990, critiquing Gaventa 1980), resistance and empowerment overlap considerably. Acts, processes and attitudes of resistance to domination and unfair power represent an imaginary of a different world. By enhancing people's appreciation of their agency and diminishing their fears of the negative consequences of taking action, acts of resistance prepare the terrain for shifting the boundaries of what is possible.

Notes
* I warmly acknowledge feedback from Jethro Pettit on a draft of this article, as well as the extensive conversations about power with him over recent years which have fed into it.

1 This challenge was well articulated by the editor of the *Journal of Political Power* when he asked whether conceptualising the power of one philanthropist billionaire or another, or one tribe or another, enables a better understanding of the social processes surrounding these actors (Haugaard 2012: 357), although he did not go on to ask whether this improved understanding would lead to more effective engagement by activists in contemporary social justice struggles.

2 See www.powercube.net/

3 For example: Oxfam GB, ActionAid, Christian Aid, Joseph Rowntree Foundation, Carnegie UK Trust – see Hunjan and Pettit (2011) and Pantazidou (2012).

4 See also www.powercube.net/analyse-power/what-is-the-powercube/

5 In contrast to political economy analysis, the epistemological origins of which lie in positivism and methodological individualism (Pettit and Mejía Acosta 2014).

6 www.powercube.net/other-forms-of-power/agency-or-structure-or-beyond/

7 www.powercube.net/other-forms-of-power/agency-or-structure-or-beyond/

8 In the title of their 2008 article 'Nobody to Shoot? Power, Structure, and Agency: A Dialogue'.

9 Examples of how can be seen at www.powercube.net/resources/case-studies/ and www.powercube.net/resources/papers/ and in Pantazidou (2012).

10 The Power Matrix can be seen at www.justassociates.org/sites/justassociates.org/files/mch3_2011_final_0.pdf

11 The added fourth column draws on action research in Buenaventura, Colombia (McGee 2016).

12 With grateful acknowledgement of co-researchers and action research participants in Commune 3, Buenaventura, Colombia (see McGee 2016).

13 See McGee (2016) for a case study of this sort of resistance to violence in Buenaventura, Colombia.

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Power in Practice: Bringing Understandings and Analysis of Power into Development Action in Oxfam[*]

Jo Rowlands

Abstract Theorising about power has developed over the past decade in ways that support significantly more nuanced understanding and analysis; the implications of this for development practice are becoming better understood, but have yet to be systematically integrated in programme design and implementation. This article explores the process of strengthening and developing power analysis in the international non-governmental organisation (NGO), Oxfam. Some of the language is shifting, and power analysis has become a prerequisite for planning processes and is seen as a foundational skill. More programmes work intentionally with informal as well as formal power, and there is more willingness to engage with complexity. In practice, there is a hybrid approach to power analysis with multiple approaches in play. It is not easy to maintain and develop understandings in the face of constant changes, and the article explores some of the obstacles and issues that need further attention for theory to reach practice.

Keywords: power, power theory, power analysis, Oxfam.

1 Introduction

When I first started exploring power in relation to my work unpacking the concept of empowerment back in the 1990s (Rowlands 1997, 1995), the multifaceted nature of power quickly became evident. To make sense of 'empowerment', and in particular to explore ways in which women might grow their power, I felt it was essential to differentiate between forms of power and the ways in which the forms that are not zero-sum might effectively be thought about and cultivated. I worked with the now widely used ideas of power *to*, power *with*, power *within* and power *over*, and found them helpful in thinking through how initiatives towards women's empowerment might be approached (see also VeneKlasen and Miller 2007). Since then there has been significant further work by many people on power, and much more deliberate

attention to bringing power analysis into the design of development programmes across a very wide range of activities and geographies.

Over the past 15 years I have been working with colleagues at Oxfam GB to explore how the organisation's work can be strengthened through better power analysis. For an organisation committed to reducing poverty and human suffering through a combination of humanitarian, long-term development and campaigning programmes, relations of power are a constant preoccupation for staff. The transformation of power relations such that women and men who are poor or marginalised are more able to make the choices that will improve their quality of life is a consistent ambition across the different elements of Oxfam's programmes. As an organisation with presence and activity, both directly and in partnership with other organisations, at all levels from local community to global, this means thinking about power in many ways. As Oxfam GB, a large organisation with considerable public recognition and as a member of a confederation with 17 members, two of which are based in the global South,[1] we also grapple with our own power, how to use it and how to navigate its pitfalls. Like any organisation, Oxfam is not homogenous and this article exploring how these efforts have developed over time and what we have been learning as we keep trying to translate theory into practice through our programmes, rests on my personal observations, conversations and reflections, and my positioning within one of the global advisory teams.

When I first joined Oxfam, I found that the language of power was not particularly noticeable in the humanitarian and long-term development programming, though power analysis was well embedded within the campaigning teams. Here it was power analysis with a particular purpose of designing campaign strategy, and focused on understanding, in relation to the specific change sought, who would be making key decisions and how those people might be influenced. In particular, it emphasised understanding the identity and positioning of people who would support or block the change, and identifying undecided actors who might be open to persuasion. As such, it focused mostly on visible power, and to some extent on hidden power.[2] On the back of this kind of analysis, some global campaigning such as that focused on debt cancellation and more and better aid (e.g. Drop the Debt, Education Now, and the Essential Services Campaign) was successful, to a degree, with some northern countries and global institutions through positive propositions. In contrast, what became a more defensive campaigning against the trade liberalisation agenda (e.g. Make Trade Fair and Trade Justice), whilst helping to bolster resistance to unfair rules amongst developing countries, has not yet resulted in significant policy or practice change. The underlying assumptions tended to be that having the right evidence, the right pressure on decision-makers and the right lobbying would lead to the desired change. Looking at campaigns that did not lead to real change on the ground, it became clear that more focus was needed at national level, for example. The assumptions about how change happened needed to involve a much wider range of actors

in different parts of the system, and much more effectively link in with the actions of others at different levels. These analyses are still part of the power analysis lexicon in Oxfam, but over time we are seeing power explored in other ways. The leadership training for campaigners now includes a clear emphasis on thinking about how change happens, encouraging a much more nuanced approach that draws on systems thinking, incorporating consideration of how social norms and attitudes impact on policy decisions, and the various factors that prevent policies from being implemented. The power analysis framing began to include the ideas of the power cube (Gaventa 2006), looking at visible, hidden and invisible power at different levels and in different spaces, as well as the power *within*, power *with*, power *to* and power *over* framing I had used in my earlier research (Rowlands 1997, 1995). Some approaches to campaigning – most notably the 'We Can' campaign on violence against women – modelled a very different approach, growing the campaign from individual activism at household level upwards and outwards to communities and then national level.[3]

Gradually, the terminologies associated with power analysis and how change happens have found their way into key documents and processes, such as stakeholder analysis, that support staff with programme design and proposal development. For the first time in 2014 the document guiding strategy development and priorities at country level required all programmes to have both a theory of change and power analysis to guide programmatic choices.[4] The language of changing attitudes and beliefs, part of the 'invisible power' of the power cube and closely associated with culture and norms, has also been used in Oxfam since the early 2000s. For a long time people knew this mattered but were not able to argue this aspect of the work to the top of priorities. Back then it failed, largely, to translate into significant changes in programme design and implementation. It is only recently that addressing these invisible forms of power has begun to be embedded in some of the programme methodologies through a deeper understanding of how poverty is underpinned by invisible forms of power, most notably in work addressing gender-based violence (GBV). Here, for example, we are seeing a shift to more focus on working with men and communities to explore how the culturally assigned value given to men's and women's activities and expectations of male and female behaviour limit everyone. It is probably no coincidence that this is the aspect of programming where more sophisticated power analysis has taken root, since there has been an understanding of gender relations as power relations,[5] and of GBV as a controlling mechanism, for a long time. In addition, this connects with a focus on how gender intersects with other power relations based on social norms such as ethnicity, social class, and sexuality and age.

So the language is shifting, and some of the practice changes are following. This is partly, as mentioned earlier, because there has been a parallel move towards more systemic thinking and approaches that draw on understandings of complexity.[6] This is associated with

a move away from a focus on service delivery, which makes changes that people need, but on a very limited scale, towards changes that transform the institutional landscape and can reach far more people as a result. A more systemic approach encourages a focus on not only changing the policies and practices that emanate from institutions, but also changing the structures, processes and behaviours within them so they are more inclusive and open to redressing power imbalances between duty-bearers and rights-holders. Programmes can become more complex, working on several levels and informal as well as formal spaces, addressing a mix of policy, structure, process and behaviour. Or they can focus on one element, while concentrating on connecting more to the work of others. Either way, they require different skill sets from staff and partners. Power analysis helps us understand that changes that might be expected to follow logical pathways, such as increasing the availability of medicines in local clinics, get impeded by many factors – some are logistical problems, some are cash flow problems (probably relating to power struggles across different sectors within public budgets), some relate to who actually benefits from the system not working well (for instance, some private suppliers who may also be local power holders) and so on. Working more systemically also requires more varied work with multiple stakeholders positioned differently within existing power relations, leading to more of a focus on convening different actors, brokering relationships and proactively emphasising the inclusion of people who would otherwise be outside these spaces. If inclusion isn't possible, it may also require other forms of mobilisation such as citizen monitoring of budgets and expenditure. This can help facilitate change towards more equitable services and use of resources, reaching many more people and particularly those who would miss out under pre-existing arrangements. But to be effective and sustainable, power relations have to change. There are no simple solutions in this territory, and as an international non-governmental organisation (NGO) we need to include our own power as an organisation in the analysis, and for our staff to be able to understand and factor in their own positional and personal power in their relationships in the various spaces (including internally) within which we work.

Oxfam's ambition draws on its ability to link local action with national change and global reach, drawing on a wide network of actors as it does so. In this, Oxfam has travelled alongside other actors in the development sector towards 'thinking and working politically' and 'doing development differently', a journey which has reinforced the need to better understand power – although these debates, as well as the academic literature, are a long way removed from the realities of front-line communities, partner organisations and Oxfam staff in navigating the everyday complexities of the work. There is a significant challenge in applying theories of power in practice, so that they become embedded in ways of working, in relationships, and embodied in the people whose day-to-day action and behaviour can contribute to shifting power. In Oxfam the capacity for power analysis is now understood as one of the foundational skills that should underpin all programmes.

In the rest of this article I will explore some of the issues I see in embedding and grounding power analysis into everyday programme activities, choices and methodologies.

2 Changing how people think about power

The dominant approaches to thinking about power in Oxfam, as elsewhere, interact closely with dominant thinking about how change happens. So, for example, where power is understood to rest with formal structures and political systems, change is seen as happening through policymaking, resource allocations, elite bargaining and formal political processes. This can imply a need for strong focus on policy change, often through campaigning and generating popular pressure. Oxfam has many examples of this approach in its history, from mobilising citizens around missing medicines in local clinics in Malawi to the people on the streets of the Make Poverty History campaign. This comes with a sense that if you get the policy change right, the change you seek will follow, if the resources and mechanisms of delivery are in place. This thinking has the attraction of indicating a route for taking any given change to scale. Thinking about power in this way can bring a bias towards formal structures and institutions, and political decision-making, because people feel they know what needs to be done and how to do that.

But this may not be enough. As has been seen many times, there are numerous instances of changes in policy, even where resources are allocated, not leading to the intended change. Often, failure of these approaches is ascribed to some combination of lack of political will and the effects of corruption – both of which indicate the need for a more complex understanding of power.

Another dominant approach to thinking about power, linked to thinking about how change happens, can be seen in what might be described as more bottom-up approaches. For example, where power is assumed to ultimately rest with people, a programme might seek to mobilise a population through building active citizenship and knowledge about rights so that local people will exert pressure for change from below; or it might seek to hold formal power holders to account for some aspect of their obligations to deliver rights, both of which can be seen in the Chukua Hatua programme in Tanzania.[7] Again, Oxfam has taken these approaches in many places, such as in supporting many community score card, participatory budgeting or other social accountability initiatives. But doing this without also addressing the incentives keeping those in positions of power focused on the interests of other, often economic groups, can just lead to frustration, defeat or worse. Thinking about change and power through citizen activism coupled with empowering methodologies can contribute to significant change for individuals and groups, particularly in terms of self-perception and confidence. They do not, however, ensure transformation in power relations in at least the short term, even when they come together into movements, and therefore continued attention is needed to the institutionalised power dynamics and the incentives of the *status quo*.

It is unlikely that many of the people designing programmes in Oxfam work with these clear-cut approaches to change any more, even if they have personal tendencies towards a particular perspective. The most recent generation of Oxfam country strategies demonstrated the beginnings of a move to a more complex picture of change processes, and power analysis was a required element in those plans, without prescribing how it was to be done. In practice, some of the resulting power analysis was superficial; some was done more comprehensively at the level of context analysis, but then not actively used to feed through into thematic and strategic choices; but some was done well, leading to redesign and refocusing of content, approach and/or entry points and new approaches to partnership.

I would also say it is less common now for power analysis to focus only on formal and institutionalised power; there is much more discussion in Oxfam programmes of traditional/customary/informal forms of visible power than was common a decade ago. A newly designed Food Security and Resilience programme in South Sudan, for example, intentionally works with local government actors as well as traditional leaders and community members to shift dynamics of power by changing the expectations they have of each other. The accompanying risk analysis is more likely to anticipate how hidden power might interact with the programme. And a number of programmes are very deliberately focusing on invisible power, looking at how culture and public opinion can change, and at how to support changes in the ideas and beliefs that hold particular inequalities or injustices in place. These include programmes working to shift the norms that prevent women's full participation in economic and public life.[8] It still remains a challenge to ensure that the analysis of power informing programme design and the strategic choices made by teams to focus their work is sufficiently robust and nuanced to make the best use of resources. And it is still a challenge to ensure that Oxfam's own power is factored into the thinking, both constructively, such as using its convening power to bring people together who otherwise might not collaborate, or in mitigating potential negative effects such as imposing bureaucratic requirements on partners that make it hard for them to stay focused on their own goals. But increasingly, Oxfam programmes are looking at ways to work on how the invisible power of norms, attitudes and beliefs affect whether particular policy or practice changes get made, have traction and lead to real change.

So I see progress in a journey from simple to complex, with an increasing willingness and even requirement to dig much deeper into the messy realities of how change happens, even, or perhaps especially, if the resulting programmes focus on simple ideas, or on continuing with familiar things that are known to work. This requires sophisticated thinking about power. And more nuanced power analysis supports more deeply drawn ideas about how change happens, opening up a new range of options for action, whether by Oxfam or by others. In addition, given the complexities, it will rarely be the case that the

analysis is complete or perfect. You often don't know how power really works in reality until you fully engage with it, so if combined with regular updating, reflection and review, good power analysis supports more agile, responsive and ultimately relevant initiatives. It is essential that space be built into programme plans to allow a regular passage round the loop of theory to practice and back again, to support learning from action and action from learning.

3 Hybrid power analysis

Various initiatives, including the Oxfam International (OI) Campaigns and Advocacy Leadership Programme, the 'National Influencing Guidelines', and a Gender and Power course under development by the OI gender team that unpacks the relationship between gender and power linking gender analysis frameworks[9] with the forms and expressions of power, all indicate that Oxfam is absorbing ideas from several sources to combine into a hybrid approach to power analysis. The early dominance of the campaigning power analysis described earlier has gradually incorporated the idea of looking not just at the structures around which power organises but the forms it takes (visible, hidden, invisible), how it is expressed (power within, with, to and over), who the actors are, how it is gendered, how it works in different spaces, at different levels and how they interconnect. There is also a continuing adherence to using some of the more conventional political economy analysis as part of the mix, as well as complexity and systems thinking.[10] This allows country offices to try things out and adapt, drawing on learning and reflection to select what works best in their context.

There has been no formalised attempt as I write to 'roll out' a standard approach to power analysis. Instead, a number of individuals,[11] myself included, have been sharing the ideas through the channels available to us, including through workshops and training opportunities on a wide range of subjects, through work to support colleagues with developing theories of change, through countless conversations, through programme support visits and, in my case, through the many induction meetings I have had with new staff over a period of about eight years, most of whom got a mini power analysis seminar. In effect, the approach has been to spread power analysis 'virally'. This has allowed individuals and teams to take their own approach, which has been useful in some respects in allowing for context-specific application and experimentation, but also leading to inconsistent application and gaps in application where there was no one confident enough to give it a try.

4 Oxfam's power analysis ambition

The more Oxfam works through a systems lens, the more we are faced with difficult choices because of the twin increasing pressures of chronic emergencies on the one hand and our resource constraints on the other, and the more multi-polar the world is becoming, the more we need power analysis to inform context analysis and decision-making. At a country level, political dynamics are more and more critical to the organisation's effectiveness and ability to build the relationships we

need to support the work on the ground, and connect that as needed to other levels. Our staff and the partner organisations we work with are navigating complex dynamics that are shifting all the time. Increasingly, Oxfam is navigating a closing operating space for civil society as an international NGO, as are our civil society partners and allies. We need to be more agile and confident to adapt. An increasing proportion of the organisation's work is in contexts where formal and informal power dynamics combine to create conditions of fragility and violent conflict. Getting a better understanding of power in the range of ways it manifests is correspondingly urgent.

Programme design is often the product of compromises between the needs in the context and the priorities of Oxfam, its partners and the providers of funding. Better power analysis – of the context and also relating to the power dynamics within partnerships, consortia and within Oxfam itself, can support the process of programme design by anticipating and mitigating some of the compromises. It can help us be more conflict sensitive and more confident of not inadvertently doing harm. Thorough power analysis can help us see more clearly the choices we make, as well as help us be more imaginative in our identification of and approaches to partnerships, alliances and other key relationships – both in terms of who we work with and how we work. For example, Oxfam's expanding engagement with young people requires very different approaches and methodologies than we have used up till now; and the wide range of work engaging the private sector, extending from micro-entrepreneurs and smallholder farmers to large corporate entities, requires constant and very different attention to power relations than hitherto. A greater fluency in power analysis would also help the organisation as it adjusts to shifts in power that emerge from partners and allies using their own power in ways which are disturbing to Oxfam's assumptions, expectations and familiar ways of working. So, for instance, when a partner who has received our support for some time begins to occupy a national or global space that Oxfam is more used to occupying itself, even if this is exactly the change that was intended, it nonetheless indicates a shift of power dynamics and the need for fresh thinking.

I would add that despite many years working with participatory and rights-based approaches, there is an ongoing need to develop stronger understanding across the spectrum of Oxfam regarding the ways in which the methods used, the relationships built, the behaviours and the choices made by individuals in different positions reflect power dynamics, both within the organisation and in relation to other actors. This is by no means all negative, and there are many examples of deliberate use of the power of Oxfam, for instance to enable others to access national or global spaces. But this is not an area where knowledge and understanding can be taken for granted. Inevitable staff turnover can mean that hard-won learning about how to work in inclusive and context-sensitive ways evaporates. A programme designed by someone with a deep understanding of power in the context may be

implemented by someone who does not have that understanding and therefore would not realise the implications of making changes. It needs constant refreshing and constant visibility.

5 Addressing the obstacles

Power analysis, applied in real programmes to understand real contexts, and to help identify effective approaches to change in complex, dynamic environments, is an essential part of Oxfam's work. It helps the organisation focus on the right impacts and outcomes, keep its work relevant, and stay focused on its priorities. At the same time, there are many obstacles to it being used consistently and effectively, whether by staff, partners or communities. These can be clustered into five categories:

- *Content:* The language of power analysis can be quite obscure and/ or unnecessarily academic. It can also be quite culture-specific (e.g. talking about the invisible power embedded in 'work–life balance' in a context where the distinction between work and personal life has little meaning). And the competing frames for power analysis can be confusing, leaving people unconfident and not sure where to start. It is important to communicate that although power is multifaceted, it is in no way mysterious and can be explored and made sense of. Power is around us everywhere, we all experience it in multiple ways even if we never think about it. It is useful to ask questions about existing work, how it engages with what kinds of power, what it avoids, where opportunities might be being missed because of assumptions made about who the programme can or can't work with and why. Different people are comfortable with different ways of thinking about power; sometimes people think 'their' way is the right way: it is useful to explore less familiar ones that help challenge the invisible power that sits in people's habitual ways of thinking and behaving.

- *Skills:* Some people seem to have the knack of power analysis without even thinking about it much. Such people read the context, connect with diverse sources of information and seem almost intuitively able to keep a finger on a multifaceted pulse in terms of the political context. Such people are not commonly found in development management, though sometimes they are found in policy roles. Even they often have 'blind spots', perhaps not understanding the role of invisible power, or that it is possible to build some kinds of power.

  However, few people feel confident to just do power analysis. There is a strong temptation to bring in 'experts' to do it for you; this can be a quick fix, but doesn't leave a team any better able to do power analysis for themselves, and would miss the opportunity to develop the thinking skills and habits that iterated power analysis can bring. To do power analysis requires thought process as well as data. Strong power analysis generally needs to draw on knowledge from diverse sources, and if that involves people, there also needs to be a managed group process. It is certainly not necessary for everyone involved to be familiar with the theoretical literature, but a good process

facilitator and one person confident with power analysis (who could perhaps be the same person) will be able to make sure questions are asked using language and images that will work for the specific participants, to make tacit knowledge explicit, to help the group build a composite picture and identify knowledge gaps. With good facilitation it is possible to build a complex picture and then draw out clear, straightforward implications for choices, actions, approaches, etc. In addition, it is very helpful to be able to reflect with others, and to invite peer support from critical friends.

- *Responsibility and accountability:* In an organisation like Oxfam, power analysis is one of those areas that usually falls across several areas of responsibility and is therefore vulnerable to having no one actually accountable for ensuring it happens. Ideally, it becomes so much part of the everyday way of doing things that it happens automatically – but to reach that point, a degree of encouragement may be needed. In Oxfam, for example, that might mean decision-makers requiring a clear power analysis to defined standards as part of every funding proposal above a certain minimum level. The internal division of labour between different teams in Oxfam can also make it difficult to get sufficient diversity of knowledge and perspective if teams are undertaking separate power analyses. So leadership with clear expectations, vision and motivation will be important in doing power analysis well.

- *Application:* Power analysis is most usefully iterative and ongoing, used to identify priorities, partnerships and alliances, to guide a range of relationships, to inform linkages between work at different levels, to ensure conflict and gender sensitivity and therefore to inform choices of methodology and approach. In practice, it should help identify whose voices need to be included in a programme, who needs to be leading and how those can be achieved. In itself, power analysis provides excellent opportunities for inclusive process that bring diverse perspectives and deep local knowledge into view. So it needs to be built into planning cycles, adequately resourced and monitored.

- *Time:* Heavy workloads, competing priorities, multiple deadlines and very ambitious programmes mean that it can be hard to carve out space for analysis and reflection. Space for learning, often closely linked with monitoring and evaluation, is increasingly being built into programme plans, and power analysis lends itself easily to these spaces. They can be good moments for updating and noticing changes. Learning needs to be incentivised, with clear commitment and drive from senior management to encourage and allow staff to make this space.

6 Conclusion
Power dynamics are everywhere, ubiquitous, complex and still only partially understood. This is as true in international development as in other spheres of human activity. The aid and development sectors are in a period of change and questioning, and under pressure to deliver in

new ways. Many people's lives have improved significantly, but the power dynamics that maintain poverty and inequality are clearly still firmly in place. There is significant potential to support a new generation of locally appropriate development work, that makes the most of potential synergies between actors, that transforms power relations in favour of those who currently get a poor deal, and that is able to take advantage of unexpected opportunities and moments of upheaval (critical junctures) when they occur. I am greatly encouraged by the way that voices have been emerging in the sector that encourage a wide range of actors to base their work on a deeper understanding of real power dynamics in real places (what is, rather than what should be), guided by local knowledge as well as specialist expertise. To do this well there needs to be a step-change in the understanding of power and how change happens. There has been a focus on 'locally driven', or 'going with the grain' approaches which has been refreshing on the one hand, in moving away from top-down imposition and conditionality; but on the other hand, if the power analysis is not robust enough and the approaches used do not deliberately compensate, there is a serious danger of reinforcing power imbalances that really need to be transformed.

It is encouraging that some funding bodies are beginning to expect more adaptive programming that is designed to handle moments of crisis or turmoil and be prepared to take opportunities that arise. Organisations like Oxfam wanting to work in these new ways will need to become more agile in reading the context as it shifts and changes, and our abilities to do high robust power analysis will be essential, not only in making that possible, but also in managing the inevitable risks to ourselves, our partners and the people on whose behalf we do what we do.

In Oxfam, we have come a long way towards getting power analysis embedded into the everyday thinking and practice of the range of people who could make good use of it, but we have not yet reached the point where it stops being something daunting, separate or added on. We do not yet consistently include ourselves in our power analyses and allow that to inform how we work. We are part of the way on a journey from power analysis being the territory of a few 'experts', towards building it as a common core capacity in the sector that people expect to develop and in which they are fluent.

Notes

* Oxfam GB unless it's clear I refer to the Oxfam International (OI) confederation.

1 With two more in the process of moving towards membership.

2 My use of language; this is not the way it was described at the time (September 2016).

3 http://policy-practice.oxfam.org.uk/publications/the-we-can-campaign-in-south-asia-338472

4 'Developing the Oxfam Country Strategy: Guidelines for the Use of Country Teams as they Review their JCAS and Develop the Oxfam Country Strategy', internal publication, Oxfam, 2014.

5 Arguably, feminists have been discussing power since Simone de Beauvoir and before. See for example, Hartsock (1983).

6 http://policy-practice.oxfam.org.uk/publications/systems-thinking-an-introduction-for-oxfam-programme-staff-579896

7 http://policy-practice.oxfam.org.uk/publications/the-chukua-hatua-accountability-programme-tanzania-338436

8 See, for example, We Care: http://policy-practice.oxfam.org.uk/publications/oxfams-we-care-initiative-an-overview-555515

9 www.genderatwork.org/OurWork/OurApproach/GWFramework.aspx

10 http://policy-practice.oxfam.org.uk/publications/systems-thinking-an-introduction-for-oxfam-programme-staff-579896 and animation: http://policy-practice.oxfam.org.uk/blog/2015/10/making-systems-thinking-real

11 I've particularly appreciated conversations with Richard English, Duncan Green, Jemma Stringer, Bridget Snell and Irene Guijt.

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Glossary

AEOI Automatic Exchange of Information
CAPD Center for Assessment and Policy Development
CBO community-based organisation
CEE Central and Eastern Europe
CHSJ Centre for Health and Social Justice [New Delhi]
CRES Consortium pour la recherche économique et sociale [Dakar, Sénégal]
CSO civil society organisation
DFID Department for International Development
EITI Extractive Industries Transparency Initiative
EMERGE Engendering Men: Evidence on Routes to Gender Equality
EU European Union
FEM Forum to Engage Men
GBV gender-based violence
GDP gross domestic product
IDS Institute of Development Studies
IDWSSD International Drinking Water Supply and Sanitation Decade
ISSC International Social Science Council
JASS Just Associates
MASVAW Men's Action to Stop Violence Against Women
MDG Millennium Development Goal
MEGEN Men for Gender Equality Now
NGO non-governmental organisation
OI Oxfam International
PEA political economy analysis
RCA Reality Check Approach
RLP Refugee Law Project
SANAM South Asian Network to Address Masculinities
SDC Swiss Agency for Development and Cooperation
SDG Sustainable Development Goal
Sida Swedish International Development Cooperation Agency
UNCTAD United Nations Conference on Trade and Development
UNDP United Nations Development Programme
UNESCO United Nations Educational, Scientific and Cultural Organisation
UNICEF United Nations Children's Fund
UNU-WIDER United Nations University World Institute for Development Economics Research
UP Uttar Pradesh
US United States
WHO World Health Organization
WMD weapon of mass destruction

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