Capabilities and Education

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The Capability Approach in Education

In its process of development from a philosophical idea - proposed by Amartya Sen - into a broad interdisciplinary evaluative framework, the so called 'capability approach' has currently received considerable attention in both theoretical and empirical research in social and human sciences. But despite the fact that the capability perspective - which includes a focus on the individual's abilities to act or, more precisely to exercise agency - as suggested by Nussbaum, Anderson, Alkire, Robeyns and others has received substantial attention not only from philosophers but also by economists and other social scientists, and despite the fact that there is seemingly a potentially strong and mutually enhancing relationship "between […the] capability approach and education" (Saito 2003), it was only recently that it has gained increased interest in an analytical and empirical examination from an educational point of view. This is surprising not only that this "approach is clearly apt for exploration from an educational point of view" (Saito 2003), but also because education and literacy might actually be considered as key factors in the capability approach: Both might be regarded as fundamental resources enabling people and structuring the effective opportunities of people to live a life they have reason to choose and value. There is hardly any doubt that being literate, knowledgeable and "having access to an education that allows a person to flourish is generally argued to be a valuable capability" (Robeyns 2005a; Unterhalter 2003).

The relation between the capability perspective and education is, inter alia, acknowledged in the 2002 UNESCO Report "Education for all". This report suggests that policies should be "judged to be successful if they have enhanced people's capabilities […]. From this capability perspective, then, education is important for a number of reasons. […] The human capabilities approach to education […] recognizes that education is intrinsically valuable as an end in itself. [… Compared to other approaches] the capability approach goes further, clarifying the diverse reasons for education's importance. Although many of the traditional instrumental arguments for education […] are accepted, the distinctive feature of the human capability approach is its assessment of policies not on the basis of their impact on incomes, but on whether or not they expand the real freedoms that people value. Education is central to this process" (UNESCO 2002, 32-33).

Having started as a primarily philosophical (Aristotelian) perspective the capability approach currently grows into an interdisciplinary paradigm for development, well-being, for educational and social policy. Amongst other aspects this is because this approach does not only provide a deliberate analytical reference for evaluation as well as a kind of theoretical umbrella for existing empirical studies but also allows for field- and domain-specific empirical operationalisation (in terms of quantitative social indicator research (see e.g. Anand et al 2004; Alkire 2003, 2005; Brandolini and Alessio 2001; Kuklys 2005; Martinetti 2000 as well as in terms of qualitative descriptive analyses [see e.g. Unterhalter 2003]). Furthermore

the notion of capability might also function as an appropriate public conception of justice (see Brighouse 2004). Most notably however the capability approach provides a conceptual framework with theoretical, empirical and normative implications that allow for a re-examination of educational issues rather than supplying a coherent educational 'theory', let alone an educational programme which could be applied straightforwardly. Thus the strength of the capability approach lies in its capacity to provide sensible tools and frameworks within which literacy, competences and other educational aspects might be appropriately conceptualised and evaluated. Understood in these terms, the capability approach – situated between and beyond existing paradigms and disciplines - might be considered as an enlightened framework for promoting social justice in education, i.e. the contribution of education to enable individuals to function as equal democratic citizens when conducting their lives in modern societies.

But for all that the capability approach is in principle – and also empirically, with respect of the broad variety of its applications (see Lister 2004 for thoughtful considerations) – open for both conservative and critical interpretations. Employing the capability approach might therefore "lead to widely divergent normative conclusions" (Robeyns 2003, 48). This is because "it is possible to use functionings and capabilities as the evaluative space in combination with many different normative accounts of choice, with a widely divergent critical content" (Robeyns 2003, 48) – from 'neo-liberal' to 'socialist' approaches. Yet the capability approach has the capacity to provide major cornerstones in the design of "just pedagogies which can be tested and adjusted empirically" and which - unlike the usually more utilitarian "key skills conceptions" - offer a more comprehensive idea of a "pedagogy of inclusion" (Walker 2002, 5; see Flores-Crespo 2004).

The Strengh of the Capability Approach: A People in Environment Perspective

In particular, by focusing on what individual – but nevertheless socially and culturally situated and embedded - agents are effectively able to do and to be, the capability approach keeps the promise to be innovative with respect to the significance of human diversity in assessing equality. With respect to major challenges of institutionalised educational processes against the background of increased social heterogeneity and inequality, the capability approach to 'just education' has the capacity to be more appropriate than its most significant alternative, i.e. a Rawlsian 'primary goods' approach to 'allocative justice'. Rawls argues that "the chief primary goods at the disposition of society are rights and liberties, powers and opportunities, income and wealth" (Rawls 1971, 62). What has basically to be done in terms of justice is to promote "the general welfare of the citizens by providing them the resources they need in order to lead lives of their own choosing" (Kraut 1999, 315). While being convincing in terms of a theory of institutional justice – including the structures of educational institutions – Rawls' approach obviously comes close to the claim that individuals' equal opportunities are tantamount to their equal command over resources. Therefore this approach concentrates "on means to freedom, rather than on the extent of the freedom that a person actually has"[1] (Sen 1992, 81) (in particular her "freedom to pursue well-being" and this "incorporates the role of human agency" [Baker 2004])

[1] Just to avoid misunderstandings: the capability approach is not sceptical about (formal) entitlements. However, practically quite realistic a perspective on entitlements is suggested that defines them as "the commodities over which a person can establish her ownership and command" (Sen 1999, 162). Understood in this way they might be considered as 'capability inputs' that do not only cover individual assets but also collective commodities.

The failure "to examine interpersonal variations in the transformation of primary goods (and resources, more generally) into respective capabilities to pursue our ends and objectives" (Sen 1992, 87) is amounts to imply, however, that all individuals have an equal capacity to launch rational life plans – which is regarded as an individual responsibility. This implication however takes (too) little notice of a broad range of constraints that people may – for instance with respect to class, gender[2] and race (see Lister 2002) - face in the real world. Even the capacity to think and act in a way which might be considered as 'rational' from a Rawlsian (i.e. political liberal) point of view might ex ante not be distributed equally (see Green 1985), but rather as a product of particular forms of education, learning and socialisation. Ignoring this may run into the risk of reproducing historical classifications around naturalised "ideas of working- and middle-class-ness, alongside the notion of the 'rational self': the middle-class self is seen as reasoning, reflexive, constrained, while the working-class self was associated with primitivism, lack of control and a 'deficit culture'" (Breadly 2005, 677).

In contrast it is a central feature in the analytical framework of the capability approach that "preference formation, socialization, subtle forms of discrimination and the impact of social and moral norms are not taken for granted or assumed away, but analyzed up-front" (Robeyns 2003, 15). More generally it raises the issue of the conversion of resources – i.e., instrumental means - into genuine ends of the individuals concerned – i.e. the intrinsic value these resources are deployed for: "The conversion argument says that the importance of these primary goods or resources is derivative on the individual capability to convert them into valued functionings. And these converting capabilities are highly diverse among people, which weakens the supporting argument for a resource-based equality" (Farvaque and Bonvin 2004, 10). Related to the substantive capacities and freedoms of persons to choose and to act, capabilities might be distinguished analytically from "actual commodities (that is, the goods, services or other resources to which people have access) and the essential characteristics of those commodities (that is the properties which define their purpose or utility)" (Dean et al. 2004, 4). They can also be differentiated in actually achieved "functionings (that is, the full range of activities – including productive, re-productive, caring, expressive and deliberative kinds of functioning that human beings may achieve) and subjective end states (that is, the happiness or sense of well-being that are the final outcome)" (Dean et al. 2004, 4). Rather the notion of capabilities represents "the essential fulcrum between primary resources and human achievements" (Dean et al. 2004, 4) or, applied to the field of pedagogy, between educational and welfare 'inputs' and educational and welfare 'outputs'. In particular when "focusing on more 'complex' functions, such as happiness, self-respect, or participation in communal life […] the capability view does constitute a distinct alternative to equality of resources because the overall accessibility of these functions depends on factors additional to the possession of personal and impersonal resources, including an individual's own attitudes and ambitions as well as those of others" (Williams 2002, 25; Dworkin 2000). On the other hand neither "the offering of resources nor the granting of rights is sufficient […] if the specific capabilities and functioning of the individuals are not addressed" (Kamerman 2001, 5). As Harry Brighouse (2004, 80) points out with respect to rights: "If someone claims that there is a fundamental right to X, it is incumbent on them to justify it; and justification will proceed by showing how the rights to X is required to serve some capability. If there is no capability that it serves, then it is not a fundamental right".

[2] Sen (1992) gives the example of "systematic disparities in the freedoms men and women enjoy in different societies, and these disparities are often not reducible to differences in income or resources".

Compared to a capability perspective focussing on "who can do what, rather than who has what bundle of commodities, or who gets how much utilities" (Sen 1984, 376) a Rawlsian 'primary goods' approach may therefore have a number of deficiencies with respect to issues concerning the life conduct of individual persons. And exactly these might be considered as to be a major focus of educational interventions. In particular the Rawlsian approach "seems to take little note of the diversity of human beings. […] If people were basically very similar, then an index or primary goods might be quite a good way of judging advantage. But, in fact, people seem to have very different needs". Thus this approach may overlook "very widespread and real differences." (Sen 1992, 215-216).

It is this 'empirical fact' of human diversity which is crucial in assessing the demands of educational justice and equality. A capability perspective has the capacity to elaborate how different dimensions, including assets and commodities, observable outcomes but also unobservable opportunities are related with respect to specific individuals in specific circumstances. From this point of view the "resource a person has, or the primary goods that someone holds" may be very essential but still be "very imperfect indicators of the freedom that the person really enjoys to do this or be that" (Sen 1980 37-38) while a "focus on basic capabilities can be seen as a natural extension of Rawls' concern with primary goods, shifting attention from goods to what goods do to human beings" (Sen 1980, 219).

If we consider 'primary goods' in infrastructures as (welfare or educational) 'inputs', a capability perspective therefore highlights, that even in the (hypothetical) case that these inputs would be distributed in an egalitarian way, they would "not necessarily give rise to equal outputs because human capabilities – the real freedoms that people have to fashion their own way of living – may be objectively constrained" (Dean et al. 2004, 4-5). The capability approach does not deny crucial importance of 'external resources'. If "people's powers" are interpreted as "resources, because these are used, together with material resources, in making something valuable out of one's life" (Dworkin 2000, 80) this would indeed come close to take note "of capabilities in defining the resources themselves, and it could be argued that this way of seeing resources would lead to a congruence of the requirements of equality of capabilities and that of equality of resources" (Sen 1984, 321). However, acknowledging the significance of resources the capability approach additionally stresses the significance of practical use-value and internal goods affecting the capabilities of individuals in terms of their abilities and opportunities to engage in a conduct of live they have reason to value. What for instance the PISA study identified as 'functional illiteracy' is therefore not primarily a 'lack of human capital' but a form of poverty in terms of a major 'capability deprivation', which points to subsequent 'voicelessness' and 'powerlessness'. Being assessed as to be relational to impairments of social arrangements, educational failures, deficiencies in the acquisition of literacy might thus be evaluated in terms of subsequent capability limitation (and their contextualisation in education).

S- and O- Capabilities and their 'Conversion factors'

While the capability approach points to the relation between 'external resources', practical use-value and internal goods, it seems possible to distinguish analytically between "O-capabilities" and "S-capabilities" (Gasper 1997, 2002) as complementary parts of a persons 'capability set'. It is important to note that this is not a substantial distinction but only of analytical or heuristic use. Actually it is a particular strength of the capability approach to blur this distinction – if it is made in a substantial way – in favour of a relationally combined perspective (see Farvaque and Bonvin 2003). Analytically, however, one may suggest that the space of capacities, skills, abilities, and attitude may form the realm of 'S-capabilities' (with

'S' meaning 'skill' and 'substantive') (see Gasper 1997) which is empirically related to a particular and socially, culturally, politically and economically constrained set of life-paths which is (potentially) attainable to a given person. This socially structured set of attainable life-paths constitutes the realm of 'O-capabilities' (with 'O' meaning 'option' and 'opportunity') (Gasper 2002). In pointing to the "necessity to combine 'individual agency' (e.g. cognitive abilities, psychological factors such as self-esteem, etc.) and 'social agency' (structures and institutions such as legal provisions or social norms, etc.) in the capabilities perspective – and thus to focus on the interface of the question 'what an individual is able to do' and 'which opportunities are open for him or her' - Bonvin and Thelen (2003, 1) are arguing in favour of a relational perspective on O- and S-capabilities. Also Martha Nussbaum (2000) deploys such a distinction. What she calls 'external capabilities' comes close to Gaspers 'O-capabilities' while 'S-capabilities' may be considered as derived from 'basic' capabilities through education, training and learning. These 'S-capabilities' come close to what O'Neill (2000) refers to when talking of 'capacities for reason' respectively cognitive and social capacities and 'capabilities for action'.

While on the surface some similarities might be discernible, in particular 'S-capabilities' should not be conflated with the contemporarily popular notion of 'human capital' (Becker 1993; Schultz 1963) the notion of 'S-capabilities' may have some kinship with Bourdieu's notion of 'cultural capital. Typically 'human capital' refers to 'investments' in personals skills and competences in order to produce a return that ideal typically should lead to benefits for both, individual welfare as well as the productivity of the economic system. As Sen (1999, 295) points out, 'human capital', relating "to broadening the account of 'productive resources' […] concentrates on only one part of the picture [. … I]t does need supplementation. This is because human beings are not merely means of production, but also the end of the exercise". It is thus necessary "to bear in mind [… that] education, and other features of a good quality of life are of importance on their own […] and not just as ‚human capital', geared to commodity production[3]"(Drèze and Sen 1995, 43). More critically Dean et al. (2004, 5) suggest that the notion 'human capital' tends to entail "a managerialist approach that is pre-occupied not with enhancing human capabilities, but with maximising economic incentives and individual self-sufficiency. The provision of skills training may well improve a person's functioning as an economic actor, but it will not of itself enhance her capacity to choose how she lives or to achieve happiness. Skills and knowledge that may be exploited in the labour market are not the same things as capabilities" (see also Robeyns 2005a). Against this background it is also misleading to confuse a capability approach concerning education and literacy with an "ideology of ability'" reproducing or even promoting educational inequality by ignoring the empirical significance - if not primacy - of social class with respect to predefined educational success (usually measured in terms of 'human capital'). This is what a capability approach to education avoids. And this might also be considered as a major difference between a notion of capability and analytically individualised, substantialised and sometimes even naturalised 'competences' of persons.

[3] "In order to clarify the relationship between human capital and human capability, Sen articulates the role of human capabilities in three ways: (1) their direct relevance to the well-being and freedom of people; (2) their indirect role through influencing social change; and (3) their indirect role through influencing economic production (Sen, 1999, 296–297). While human capital is considered to fit into the third category, the concept of human capability incorporates all categories. All categories relating to the role of human capabilities are composed of intrinsic value and instrumental value" (Saito 2003, 24).

From a capability perspective in contrast, education and literacy have both instrumental and intrinsic value (Saito 2003, Unterhalter 2003). In particular they may be considered as means to remove obstacles in the life of young persons "so that they have more freedom to live the kind of life which, upon reflection, they have reason to value" (Robeyns 2005, 3). A capability approach to education and literacy is thus concerned with evaluating processes of learning and acquisition as being embedded in broader social, cultural, economic and policy arrangements, while taking individual aspirations into account rather than dictating social benchmarks. These relational and embedded processes are evaluated in the space of those valued 'beings and doings' that Nussbaum and Sen use to call the 'capabilities' of individual agents. The very basic idea of capabilities as an evaluative frame is that what matters most to people is their substantial structural as well as individual ability to achieve 'functionings'. Functionings according to Amartya Sen are tantamount to 'the actual living that people manage to achieve' (Sen 1992, 52) i.e. to what an individual person has accomplished and realized at any given time (Alkire 2003, 6). Beyond a focus on whether persons do (or do not) achieve particular functionings, the capability approach most notably assesses whether she or he is free to achieve them, given the personal (education, competencies, literacy etc.), material, and social resources available to her.

Thus human capabilities reflect the heterogeneous collection of desirable states that an individual has effectively access to. Focusing on people's capabilities to function, the capability approach is about "their effective opportunities to undertake the actions and activities that they want to engage in, and be whom they want to be" (Robeyns 2005, 3). By adopting a 'capability perspective' public institutions such as Social Work would thus expand the idea "of social justice beyond […the] traditional aspirations of achieving minimalist levels of human need to one that would produce outcomes that would enable each individual to realize his or her full human potential" (Reisch 2002, 352).

Analytically the capability approach highlights the personal, social, economic, cultural and institutional factors giving individuals the opportunity to do and to be (or not to do and not to be) what they consider valuable (or invaluable) for their fulfilment. As Ruth Levitas (2004, 616) puts it: "Valued capabilities, as well as capabilities themselves, are always socially produced. Since desires, capabilities and capacities are social in their origin as well as their development, it follows that in any human society, the free development of each and the free development of all will be subject to social determination at every stage". This comes close to what Bourdieu used to call "generative capacities of dispositions, […which] are acquired, socially constituted" (Bourdieu 1990, 12).

This point of view fits well into the definition of freedom which is central for the capability approach. Freedom in this context is not primarily conceived as the mere degree of the presence or absence of coercion or interference (from others). It is rather conceptualised as the scope and scale to which a person is feasible to decide what she or he might actually realize to be and to do and thus "the range of options a person has in deciding what kind of life to lead' (Drèze and Sen 1995, 10). Focusing on individuals and their potential for agency, capabilities might therefore be understood as a person's 'substantive freedoms' to choose and conduct a life she or he has reason to value (Sen 1992). This includes the abilities to pursue and enjoy states and objectives constitutive to social and emotional well-being. In other words:

'capability' refers to the alternative combinations of functionings - and sets of functionings[4] feasible for an individual to achieve. It discribes "a person's ability to do valuable acts or reach valuable states of being" (Sen 1993, 30). To put it in a nutshell: The capability approach makes two basis assertions: "(1) that the right perspective from which to judge a person's well-being is functionings, and not necessarily mental attitudes such as utilities; (2) that, in judging from the perspective of functionings, we should not merely look at whether a person is enjoying the preferred alternative but whether a person actually has the choice of an alternative: freedom to choose" (Saito 2003, 26).

With respect to children, the second aspect might be regarded as problematic because it could be considered as an inappropriate libertarian choice option vis-à-vis a child. As for instance John White (1973, 22) argues: "Letting children learn what they wanted in this way might well restrict the range of possible things which they might choose for their own sake: they might fail to learn about other things which might also have been included". Nevertheless the capability approach – and the 'freedom' or 'autonomy' argument - basically seems to be still applicable to children. As Sen elaborates: " It is the second aspect (2) that is weak for the child but the first (1) is not. The functioning space (1) is still appropriate to think about, even the well-being of the child. The freedom aspect (2) is affected, but even the freedom aspect may be important for a child because: A) a child makes some decisions, like whether he or she is being unhappy, wants milk and so on; and B) a child's future involves the time when the child will actually exercise some freedom" (Saito 2003, 26). The most relevant question to the 'autonomy argument' is not whether a child should enjoy autonomy or not – the simple answer is that she or he should – but whether the freedom (the capabilities) the child will have in the future fall victim to the freedom a child has now. "Therefore, as long as we consider a person's capabilities in terms of their life-span, the capability approach seems to be applicable to children. The fact that children need to have support from parents, society or others in terms of choosing which capabilities to exercise will lead us to consider what role education can play in the capability approach […]. As a consequence, it seems appropriate to argue that education which plays a role in expanding the child's capabilities should be a kind of education that makes people autonomous" (Saito 2003, 26, 28).

Given these considerations, educational and welfare institutions as well as other policies should be evaluated according to their impact on people's present and future capabilities. Thus, according to a capability approach, 'human well-being' – as a mayor concern of education - does neither primarily depend on the scopes and scales of consumption of material, social and cultural commodities (which may be mediated by educational attempts) nor on the actual doings and beings that persons might have actually realised, but rather on the scopes and scales of the freedoms human beings have reason to choose and value. As Martha Nussbaum puts it: "For political purposes, it is appropriate that we shoot for capabilities, and those alone. Citizens must be left free to determine their own course after that." (Nussbaum 2000, 87). A similar point is also made by Sen, suggesting that "The 'good life' is partly a life of genuine choice, and not one in which the person is forced into a particular life – however rich it might be in other respects." (Sen 1985, 70)

[4] These functionings – referring to valued 'beings and doings constitutive of a person's being' (Sen 1992, 39) - may vary from very basic issues (i.e. being well nourished) to the very complex (being able to conduct ones social life in parity of participation).

Seen in this light it is not to deny that 'being educated' and 'being literate' has an intrinsic value but even more important is to assess literacy and education according to its effect on things people value and have reason to value. The place of education – or more precisely of an "autonomy facilitating" form of education (Brighouse 2000) - in this context may be thus considered as expanding capabilities of people ('valuable beings and doings') and providing young people with access to positive resources that are necessary to obtain, as well as ensuring their ability to make choices that matter to them. It may be equally important that the use of the capability approach allows to consider personal and societal characteristics that influence the construction and achievement of the various aspirations.

This latter point seems to be significant with respect to issues of personal control over ends, desires, wills, preferences, tastes etc. This is important because the social and cultural position of an individual - respectively her location within her actual capability set in present - tends to operate as a pre-determination on what choices tend to be "reasonable to expect" (Bourdieu and Passeron 1977). This might be considered as the problem of "adaptive preferences" (Sen 1999) – i.e. desires adapted to deprivation. The problem of adaptive preferences points to the insight that people tend to adapt to circumstances which may be 'objectively' unfavourable (see Burchardt 2003 for empirical evidence), because people's desires and preferences respond to their beliefs about norms and about their own opportunities. Thus people usually "adjust their desires to reflect the level of their available possibilities" (Nussbaum 1999, 11). As David Swartz (2000, 103) puts it, the adaptive internalisation „tends to shape individual action so that existing opportunity structures are perpetuated. Chances of success or failure are internalized and then transformed into individual aspirations or expectations; these are then in turn externalized in action that tends to reproduce the objective structure of life chances."

In deprived situations any 'subjective' self-evaluation in terms of satisfaction, desire fulfilment or happiness may thus be potentially cynical or at least point to directions susceptible to mistakes (see Landhäußer and Ziegler 2005). This is, inter alia, because the social positions of individuals and groups may be considered as a kind of social matrix within which, as Pierre Bourdieu (1984, 471) puts it "interactions of everyday life, the social order is progressively inscribed in people's minds. Social divisions become principles of division, organizing the image of the social world. Objective limits become a sense of limits, a practical anticipation of objective limits acquired by experience of objective limits, a 'sense of one's place' which leads one to exclude oneself from the goods, persons, places and so forth from which one is excluded"[5].

From a capability perspective, education might thus be appropriately regarded as a process of expanding capabilities as well as a process which decides whether individuals have to remain in or are able to move beyond their 'sense of place'. Furthermore it seems adequate not to take all (empirically imaginable) preferences to be on the same footing. Instead one should differentiate between different qualities of preferences. An "approach based on human functioning and capability […may] reject utilitarian preference-based approaches […] precisely because they were unable to conduct a critical scrutiny of preference and desire that

[5] "The *sense* of limits" this quote goes on, "implies forgetting the limits. One of the most important effects of the correspondence between real divisions and practical principles of division, between social structures and mental structures, is undoubtedly the fact that primary experience of the social world is that of doxa, an adherence to relations of order which, because they structure inseparably both the real world and the thought world, are accepted as self-evident"

would reveal the many ways in which habit, fear, low expectations, and unjust background conditions deform people's choices and even their wishes for their own lives[6]" (Nussbaum 2000, 114). Focusing on what people can do and be, rather than being exclusively directed towards their mental states or the assets they have at their disposal, such an approach on education is concerned with the capabilities of each and every individual who is, as Martha Nussbaum (2003, 67) puts it, the primary subject of political (social and cultural) justice. In terms of its normative implications the capability approach may thus be interpreted as individualistic. As Melanie Walker (2004, 4) points out: "At issue is that Sen's work is informed by this ethical individualism – every diverse person counts - whereas the neo-liberal view grounded in an ontological individualism is driven by selfish self-interest. The implication for education is that while statistical indicators (for example how many children are in school, for how long, with what success in examinations) are important, these cannot tell us the whole story of how well children are doing in school. We need to find methods that enable us to scrutinise individual experiences and outcomes as well". This perspective impedes forms of evaluation that focus on aggregated benefits initiatives may deliver for the whole society while it affects individuals. It avoids approaches to evaluation that do not look at what education provides for individuals but concentrates on its benefits for a larger grouping such as 'the society', 'the nation' (or 'the economy').

Ingrid Robeyns (2002) also insists that such an interpretation of the capability approach as ethically individualistic – being related to the Kantian principle of each person as an end - should not be confused with a (neo-)liberal version of ontological individualism that individualises both 'personal choices' as well as success and failure as consequences that flow from personal choices. Basically the perspective of ontological individualism claims that "all social phenomena are to be explained wholly and exclusively in terms of individuals and their properties" (Bhargava 1992). Ontological individualism thus suggests that social entities may be identified by reducing them to individuals.

By making the degree of actual realizable individual freedoms the evaluation space of well-being the capability approach in contrast endorses an ethically individualistic perspective. However it explicitly does account "for social relations and the constraints and opportunities of societal structures and institutions on individuals" (Robeyns 2003). Capabilities and functionings are not free-floating but structured and shaped "by structural positioning and also by welfare institutions and levels of collective provision" (Lister 2004, 20). The capability approach therefore points to the necessity to analyse the "contingent circumstances, both personal and social" (Sen 1999, 70) to which individual capabilities depend. It opens up for a relational perspective on individuals life, it pays much attention "to the links between material, mental and social well-being, or to the economic, social, political and cultural dimensions of life" (Robeyns 2005, 4) and it recognises that our "opportunities and prospects depend crucially on what institutions exist and how they function" (Sen 1999, 142). This includes that considerable attention is given to the insight that our "opportunities and prospects depend crucially on what institutions exist and how they function" (Sen, 1999,142)

[6] The work of Tania Burchardt (2003, 21-22) delivers a whole range of empirical evidence that "[s]atisfaction itself is influenced not only by the current situation but also by the individual's previous experience. [… Therefore for instance t]hose who have become poor are less satisfied than those who have been poor for a long time […] These past experiences may have been shaped by all sorts of injustice and inequality, and the fact that they influence individuals' current satisfaction, implies that satisfaction - the best proxy we have for the concept of utility - is unsuitable for assessing current well-being, justice or equality. Instead we need an objective normative standard of assessment, such as is offered by the capabilities framework".

and that individual capabilities are buttressed by "social arrangements" (e.g. Sen 1993) which may either support – and give 'capability inputs' - or deny their capabilities.

Therefore Drèze and Sen (1995, 6) point out that the very idea of the capability approach is not influenced by any notion of ontological individualism while it actually is "much concerned with the opportunities that people have to improve the quality of their lives. It is essentially a 'people-centered' approach, which puts human agency (rather than organizations such as markets or governments) at the centre of the stage. The crucial role of social opportunities is to expand the realm of human agency and freedom, both as an end in itself and as a means of further expansion of freedom. The word 'social' in the expression 'social opportunity' […] is a useful reminder not to view individuals and their opportunities in isolated terms. The options that a person has depend greatly on relations with others and on what the state and other institutions do. We shall be particularly concerned with those opportunities that are strongly influenced by social circumstances and public policy".

With respect to education this perspective may implicate that total value of resources – e.g. what Pierre Bourdieu used to call 'cultural capital' - made available in the course of educational processes should be related to actors different abilities to transform them into baskets of assets which they are then potentially free to make use of. Such stocks of (educational) assets are in turn to be related to the conditionality of what Sen (1985) calls "functions of utilization" capturing a whole range of personally bonded characteristics (most obviously sex, age but also physical or mental dispositions and handicaps) as well social characteristics (such as the status-position a group or person holds in the social order).

In order to assess the contribution of welfare and educational institutions it seems to be useful to distinguish between a persons capabilities and what Robeyns calls 'capability inputs'. 'Capability inputs' might be considered as conditions of possibilities for individuals to both, develop and realise their capabilities. Inter alias capability inputs include resources such as income, education, literacy, competences and what Bourdieu used to call the 'social capital' of an actor. Furthermore Robeyns also mentions "social institutions, e.g. a fair and efficient legal system", "non-monetary production" (such as care, domestic work, voluntary work) and "the community's culture, e.g. attitudes towards working mothers, part-time working fathers, gays, minorities" all of which may constitute potentially significant capability inputs. With respect to educational institutions finally, the quality of "public goods and services" such as "child care facilities, high-quality education" can be considered as very basic 'capability inputs'. "For each capability, it is important to ask which are the most important capability inputs, and how we can change them" (Robeyns 2005, 5). To give convincing answers to this question seems to be one of the most important task for an evaluation of educational processes from a capability perspective.

The value of these capability inputs however is not their mere existence but rather the degree to which individuals are able to convert this structural inputs into effective capabilities. Recognising diversity of individuals the capability approach therefore "stresses that different people need different types and different amounts of capability inputs to reach the same wellbeing. In the terminology of the capability approach, this is highlighted by pointing out that there are factors which influence how well a person can 'convert' capability inputs into capabilities" (Robeyns 2005, 6). In this context it seems to be reasonable to differentiate (at least) three sets of 'conversion factors' that might be investigated empirically. Those are

1. 'Personal conversion factors' such as physical condition, literacy, competences etc. that influence how a person is able convert the characteristics, commodities, infrastructures, and arrangements into a functioning.

2. 'Socio-structural and cultural conversion factors' such as social or religious norms, gender roles, power relations and hierarchies, discriminatory practices and

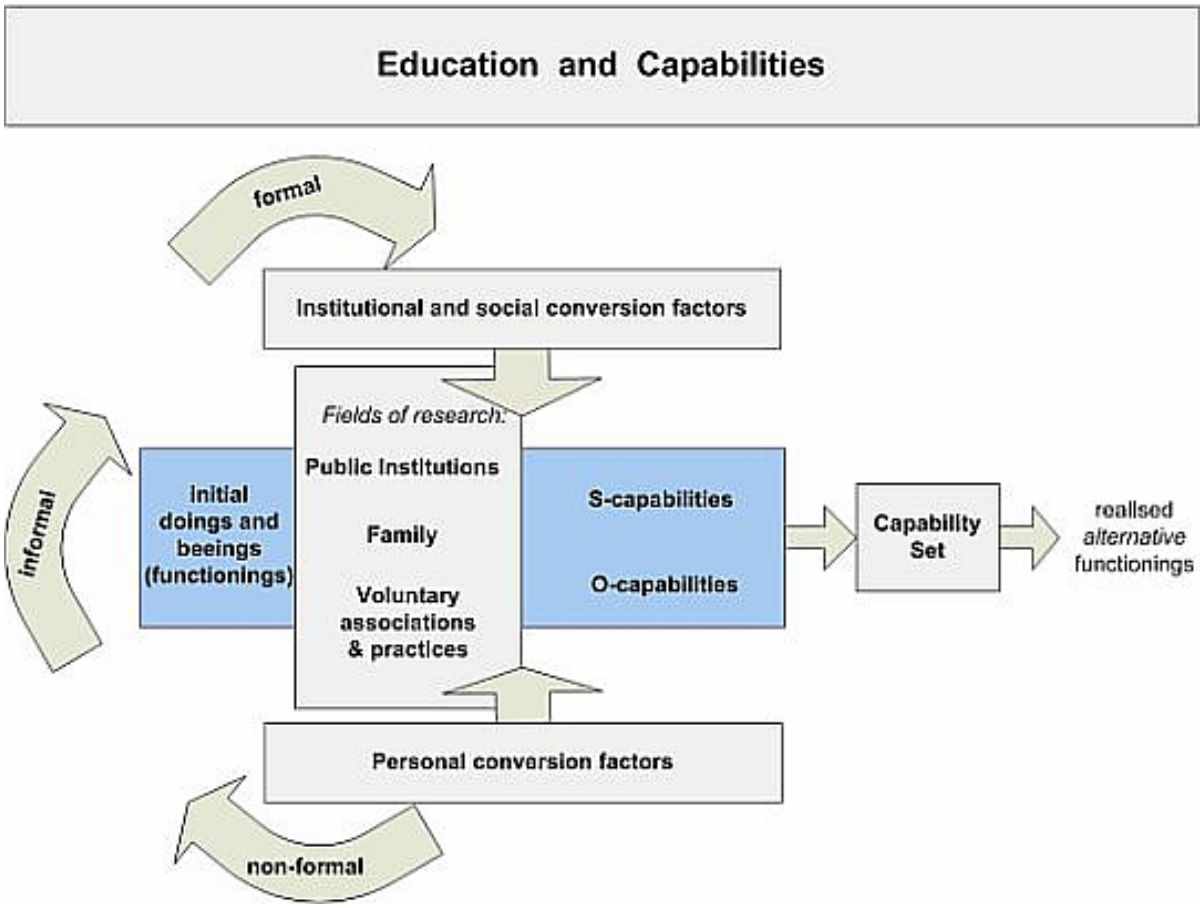
3. 'Institutional conversion factors' such as welfare and educational arrangements, collective provisions etc.

All of these factors influence whether, how and to which degree a person is able convert the characteristics of 'external' and 'internalised' economic, social and cultural assets into particular personal functionings (see Robeyns 2005).

Given these consideration education might not only be interpreted as a capability, but also as 'capability input' and as 'personal conversion factor'. Education might be a means to expand capabilities, a means to convert assets into capabilities and it might also be a considered as a capability itself. This is simply because education has both intrinsic and instrumental value. As Madoka Saito (2003, 25) puts it: "In short, on the one hand, education is an important factor in broadening human capabilities, which include human capacities. On the other hand, human capabilities play a role in influencing both intrinsic and instrumental values. Therefore, it seems appropriate to say that education plays a role in influencing both intrinsic and instrumental values. What the concept of human capabilities has contributed to this discussion is to clarify the process of influencing intrinsic and instrumental values through education. Clarifying this process helps to show education as concerned with both intrinsic and instrumental value".

With respect to formal, non-formal and informal educational dimensions and their related major educational fields, one could imagine tracks of research on structural personal levels which could be schematically visualized as in figure 1.

Figure 1:



Source: Bielefeld University and University of Dortmund 2006: Proposal for a Graduate School of Education and Capabilities. Bielefeld/Dortmund

What 'Just Education' ought to Supply

If the minimal task of education would be "to get equal basic capability for everyone" this would imply "to get each person at or above the threshold level for every one of the capabilities that are specified to be necessary for a minimally decent or good enough life" (Arneson 2002). Obviously this task may be developed in various analytical and theoretical ways. It depends on what is identified as basic capabilities. Which capabilities then, does society – or the public institutions of a society - have an obligation to promote for each individual and eventually also seek to equalize? What are the 'good-enough principles of education' respectively the "good-enough principles of welfare" (Williams 1999) in the space of capabilities? In terms of research it may be appropriate not to define a fixed general, comprehensive list of such capabilities. It rather seems to be reasonable to define them properly with respect to particular research questions. One may for example think of evaluating educational processes in the realm of a capability perspective focussing on "educational outcomes in terms of completion rates, or exam performance, or productivity". But it may also be appropriate to evaluate them with a focus on "wider outcomes such as empowerment, confidence, and citizen participation". For both perspectives the number and operationalisation of relevant (sets of) achievements or functionings - which are more or less directly measurable - as well as of - possibly rather latent, unobservable and interdependent - capabilities (which might be endogenous in structural models) and eventually also of the (sets of) social, political and institutional factors - which may influence the regarding capabilities

(and which may in turn also be influenced by them) - might be very different. Research and analyses may also focus on considerably different functionings and capabilities when studying the appropriation of literacy in the field of schooling or when examining youth welfare interventions in the case of family problems. It is thus possible an useful to employ and to modify the capability approach due to both, different fields of research and different research interests.

Nevertheless there are at least to major suggestions with respect to the identification of basic capabilities which might be considered as fundamental in the fields of education and welfare. The first - most closely related to the work of Martha Nussbaum and her 'list of basic capabilities' - seeks to figure out "an objective account of human well-being or flourishing. The aim is to identify all of the functionings needed for human flourishing. For each of these functionings, the ideal is that each person should be sustained in the capability to engage in every one of these functionings at a satisfactory or good enough level (Arneson 2002). The second suggestion - most closely related to the work of Elizabeth Anderson (1999) - ties the capability approach "to the idea of what is needed for each person to function as a full participating member of modern democratic society. Each person is to be sustained throughout her life, so far as this is feasible, in the capabilities to function at a satisfactory level in all of the ways necessary for full membership and participation in democratic society" (Arneson 2002, for an application of this suggestion in the field of youth welfare see Ziegler 2004, for a discussion on the relations of this perspective and Nancy Frasers work on 'parity of participation' see Robeyns 2003).

If the capability approach is conceived in terms of the latter proposal the potential of educational processes as 'capability inputs' rests mainly on their link to people's agency and on their capacity to form people who act as critical agents of their own life conduct. The fundamental idea of Anderson (1999) is that a capability approach should elaborate some basic but nevertheless definite negative and positive aims: "Negatively, people are entitled to whatever capabilities are necessary to enable them to avoid or escape entanglement in oppressive social relationships. Positively, they are entitled to the capabilities necessary for functioning as an equal citizen in a democratic state [… i.e.] enabling all citizens to stand as equals to one another in civil society". This obviously comes close to Nancy Frasers' 'principle of participatory parity' requiring a "creation of conditions that facilitate the meeting of human need and the exercise of caring responsibilities in such a way as to ensure that all individuals can develop and flourish as citizens" (Lister 2002). More generally this principle involves the demand that "the distribution of resources must be such as to ensure participants' independence and 'voice'" (Fraser 1998, 31, see also the work of Farvaque and Bonvin 2003 on 'capability for voice'). It also involves that "institutionalized patterns of interpretation and evaluation express equal respect for all participants and ensure equal opportunity for achieving social esteem" (Fraser 1998, 31). The latter aspect is also reflected in the "ability to appear in public without shame"[7] (i.e. the ability to avoid humiliation) which is broadly considered as a to be a very basic capability (De Herdt 2001, Sen 1983). This also points to the close relations between issues of 'recognition' and 'redistribution'. Both are not only

[7] There is hardly any doubt that self-respect – and subsequently social esteem - itself is a very central functioning (see Ziegler 2004). As Sen puts it "An absolute approach in the space of capabilities translates into a relative approach in the space of commodities, resources and income if dealing with some important capabilities, such as avoiding shame from failure to meet social conventions, participating in social activities, and retaining self-respect" (Sen 1983, 167).

related because "feelings of ambivalence, inferiority and superiority, visceral aversions, recognition, abjection and the markings of taste constitute a psychic economy of social class" (Reay 2005, 911) but, as Andrew Sayer (2005, 947) points out, also because "class inequalities render equality of conditional recognition impossible, because they prevent equal access to practices and goods worthy of recognition".

However public institutions of education may not support a comprehensive broadening of the space of capabilities. Elizabeth Andersons takes the example of an individual caring about playing cards well. No doubt being a good card player is a functioning, and we could imagine that some people may reasonably value corresponding capabilities against the background of their conception of a good life. For starters there is nothing wrong with individuals striving for being good at playing cards. However as Anderson (1999) puts it: "Being a poor card player does not make one oppressed. More precisely, the social order can and should be arranged so that one's skill at cards does not determine one's status in civil society. Nor is being a good card player necessary for functioning as a citizen".

With respect to such considerations Anderson (1999) concludes that a formulation of the capability approach aiming at "democratic equality" would be appropriate. Such a formulation would aim "for equality across a wide range of capabilities" but it would nevertheless be not endless – and thus impossible to measure and be reconstructed in empirical terms - as "it does not support comprehensive equality in the space of capabilities". Thus also in terms of education as an individually incorporated good delivered by public human services it seems to be justifiable not to focus on all thinkable capabilities that individual persons may or may not want to achieve but rather on the capabilities necessary for functioning as an equal citizen within a modern, democratic society. This does not only imply an appropriate provision of distributable resources and infrastructures but also includes a focus on agency, voice and recognition.

So what are the capabilities necessary for functioning as an equal citizen – i.e. the capabilities that public institutions following the principle of democratic equality should minimally guarantee to every single individual? Andersons (1999) argues that to "be capable of functioning as an equal citizen involves not just the ability to effectively exercise specifically political rights, but also to participate in the various activities of civil society more broadly, including participation in the economy. And functioning in these ways presupposes functioning as a human being". Thus there are three basic "aspects of individual functioning: as a human being, as a participant in a system of cooperative production, and as a citizen of a democratic state".

These three aspects fit well to suggestions about democracy and education such as Amy Gutmanns well known "democratic authorization" and "democratic threshold principle". Basically both of these principles require "to provide all children with an ability adequate to participate in the democratic process" (Gutman 1987, 136). Drawing on Gutmann the suggestions of the German Philosopher Ulrich Steinvorth (1999) about what education should provide even sounds like an implicit application of Andersons' capabilities for functioning as an equal citizen. At least it shows that such a capability perspective does provide a convincing space to evaluate the 'capability inputs' of educational institutions. Steinvorth (1999, 277) argues that education has to provide „abilities which are not discretionary in a succession which is not discretionary. To prioritise are those which secure the capability to political codetermination because without these abilities a human being is excluded from all decisions that concern herself and that constitute the scope of self-determination. Thereafter the abilities

to participate in processes of production are to centre, which make available the material conditions of her existence. If education is able to provide both capabilities to everybody it fulfils the democratic minimum of what is to be expected from education"[8].

A further aspect of the provision of democratic 'capability inputs' in the field of education is the creation of space for the "capability for voice" to become effective. This implies the creation of places where individuals get the opportunity to express their own opinion, if they want to as well as the creation of a space for the 'meta-capability' of reflection (see Ziegler 2004). This 'meta-capability' refers to the ability and opportunity to "to form a conception of the good" (Nussbaum 2000, 79). It is also a basic precondition for process of generating informed and considered decisions that matter to plan and shape one's life (see Walker 2003) i.e. for individuals and groups to be able to identify valuable capabilities and to participate in informed discussions (including criticism and dissent) on this subject[9].

Given these considerations one might draw the conclusion that there are indeed strong and intrinsic relations between education and the capability approach. As Lorella Terzi (2004, 10) puts it: "Education is basic […] in the sense of being a fundamental capability, and foundational to other capabilities as well as future ones. […]. The broadening of capabilities entailed by education extends to the advancement of complex capabilities, since while promoting reflection, understanding, information and awareness of one's capabilities, education promotes at the same time the possibility to formulate exactly the valued beings and doings that the individual has reasons to value. On the other hand, the expansion of capabilities entailed by education extends to choices of occupations and certain levels of social and political participation. […] These considerations lead to an understanding of education as fundamental capability, which includes basic capabilities, in terms of those enabling beings and doings that are fundamental in meeting the basic need to be educated but equally foundational to the promotion and expansion of higher, more complex capabilities".

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[8] Erziehung hat „nicht beliebige Fähigkeiten und nicht in beliebiger Reihenfolge […zu vermitteln], sondern zuerst solche, die jedem die Fähigkeit zu politischer Mitbestimmung sichern; denn ohne diese Fähigkeit bleibt der Mensch von allen Entscheidungen ausgeschlossen, die ihn selbst betreffen und den Rahmen der Selbstbestimmung bilden; sodann die Fähigkeit zur Teilnahme am Produktionsprozess, in dem er sich die materiellen Bedingungen seiner Existenz verschaffen kann. Kann die Erziehung jedem diese beiden Fähigkeiten sichern, so erfüllt sie ein Mindestmaß dessen, was man von Erziehung verlangen muss" (Steinvorth 1999, 277).

[9] As Sen (1999, 241-242) puts it: „Ways of life can be preserved if the society decides to do just that, and it is a question of balancing the costs of such preservation with the value that the society attaches to the objects and the lifestyles preserved. There is, of course, no ready formula for this cost-benefit analysis, but what is crucial for a rational assessment of such choices is the ability of the people to participate in public discussions on the subject. We come back again to the perspective of capabilities: that different sections of the society (and not just the socially privileged) should be able to be active in the decisions regarding what to preserve and what to let go. There is no compulsion to preserve every departing lifestyle even at heavy cost, but there is a real need—for social justice—for people to be able to take part in these social decisions, if they so choose".

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