

Research Report: MARRIAGE POWER AND WELLBEING

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Background

Intrahousehold inequality in rights and access to resources, divisions of labour, education, and decision-making roles have been extensively documented for developing countries, and stimulated economists to question unitary theories of the household and develop new ways, through game theory, of understanding the processes generating such outcomes (Lundberg and Pollak 1993). These innovations have involved both formally developed models and applications, and, notably, Sen's model of cooperative conflict (1987) which has been very influential in gender analysis of development as way to understand intrahousehold inequality and wellbeing. His starting point is a critique of bargaining approaches which assume that both parties value their personal welfare equally, and which ignore the ways perceptions influence bargained outcomes. Sen's model however has not been formally modelled by economists, nor has it been subjected to scrutiny in relation to empirical data collected specifically to test the elements of the model. This would be very useful in order to support, extend, challenge, refine or reject parts, or all, of the model.

The literature on household models, intrahousehold relations and development, has tended to remain dominated by economics, and encounters with anthropology limited to a fairly superficial adoption of multi-methods research (Quisumbing 2004). Economists make only schematic use of the anthropology of domestic groups, and for their part, anthropologists are both impatient with the reductionism of economists models (Hart 1994) and excluded from economists models by their formal expression. This research aimed to bring these parallel analyses closer; ie marriage as a social relation understood through social theory and ethnography, and intrahousehold relations between women and men understood through bargaining models, primarily Sen's cooperative conflict model.

The cooperative conflicts model has three elements, all of which are taken to have significance both as objective and as perceived phenomena. This is because Sen criticises bargaining approaches to intrahousehold relations for assuming that both parties have the same level of perceived *personal welfare*, and he points out that an Indian woman asked about her wellbeing is likely to reply in terms of familial rather than personal wellbeing. Thus the actual and perceived self-interest in cooperation will influence the bargaining strength of partners to a marriage. So too will the actual and perceived levels of *contribution* to the cooperative enterprise, the household, with the partner contributing more, and/or perceived as so doing, gaining relative bargaining power. Finally the actual and perceived *breakdown positions* of partners will affect their differential ability to influence outcomes. These three elements make up the cooperative conflicts model; in which the party with the stronger actual and perceived self-interest, contribution to household and breakdown position will enjoy bargained outcomes closer to their preferences than to those of the other party.

Using the methods of experimental economics, which has been used to test many of the fundamental assumptions of economic theory, to examine how far actual allocation behaviour in controlled conditions conforms to Sen's model would be original and innovative to both development studies, which has had a relatively slight engagement

with experimental economics, and to experimental economics, which has had a relatively slight engagement with developing country contexts and cultures, or indeed with experiments involving groups rather than individuals.

Sen's model also requires knowledge of household livelihoods since perceptions of contribution must be complemented by knowledge of divisions of labour and responsibility, control of incomes and distribution of wellbeing and so on. It also requires knowledge of the actual and perceived breakdown positions of women and men in the event of cooperation failure. Such data demands both a broader survey of local rural livelihoods and detailed material on the specific livelihoods of individual households and in-depth interviewing about perceptions of self-interest, understandings of wellbeing, perceived contributions and breakdown positions, and processes of negotiation and influence within conjugal relations. This is rather demanding, since it requires a conceptual and methodological reach well beyond economics.

In feminist sociology and anthropology marriage has generally been seen as an institution which expresses the subordination of women (Pateman 1988, Moore 1988, Jackson 2003, Jackson 2007) through forms of marriage exchange which appear to objectify women, sever the support of natal kin (in patrilocal marriage), give women little choice of marriage partner, give the control of wives bodily capacities for reproduction to husbands, devalue domestic work by women, impose material and social penalties for divorce, and so on. The counterpoint to this is the minor strand of analysis which points to the ability of women to disrupt the formal power accorded to men within marriage (Salamone 1976, Boddy 1989) in what might be described, adapting Scott (1985), as everyday forms of 'conjugal resistance'. Some such resistance involves wives manipulating the public reputation of men (significant in many masculinities) through embarrassment, covert investment in natal kin, transgression expressed through parody (Boddy 1989, Tsing 1993), withdrawals of domestic services, and the use of sexuality as a means of social mobility. The conduct of marriage is therefore not a simple institution which enforces a gender order of male dominance, but an active field of struggle for voice, gender interests and preferred outcomes, in short where women are differentially empowered and disempowered in ways which affects the character of all their other social relations. Understanding the who, why and how of women's engagement with labour (and other) markets, civil society, the exercise of rights, and the drawdown of state services, requires better understanding of power and agency within marriage.

How are poverty and marriage linked in gender analysis of development? This relationship has been predominantly defined by research into how women are generally subordinated within the conjugal contract (Whitehead 1981), and thus can only bargain from weakness in relation to access to household resources and labour obligations (Kandiyoti 1988, 1998). However, Jane Guyer's work on domestic budgets in Cameroon shows that the absence of marriage may be significantly damaging to women's material interests (1988) and indeed the implications of research on the poverty of women headed households implies that the absence of conjugal support is connected to women's poverty. Marriage in this literature appears to be an institution which inhibits the wellbeing of women, and is keyed into wider patriarchal cultural forms, so that it may be the best arrangement possible under existing unequal social relations of gender. Gender analysis of development has also turned to consider men and masculinities, and thus the question arises of whether marriage benefits men since they are the socially dominant gender? This is not entirely clear, since marriage is not necessarily as easy to sustain as may be thought, and marital breakdown has negative consequences for men which

require further analysis (O’Laughlin, 1998, Jackson 2007). Ethnographic research on men and masculinities such as Salamone for the Hausa (1976) show that poor men have difficulty remaining married. For the Bagisu of south eastern Uganda, the predominant group for the proposed research, the inability to remain married entails significant wellbeing threats for men (Heald 1998, 1999).

Development policy, economists models, and gendered anthropological research are concerned with understanding the space for empowerment of those who suffer illbeing as a consequence of their gender identity. Empowerment is ultimately something that occurs through the actions and agency of the subordinated – development policy and interventions can take the horse to water, by creating enabling conditions, but it is the individuals themselves that must drink. Thus we must grapple with the exercise of agency within marriage, and the ways in which power is expressed, controlled, effective and thwarted in the everyday conduct of conjugality, and the trajectories of marriage, divorce, remarriage and non-marriage over the life course.

Finally, an important debate about the politics of speech within (feminist) anthropology is a bridgehead between Sen’s model in which, as explained above, women are seen to have different perceptions of personal welfare. The question is whether this reflects ‘false consciousness’, or is a culturally approved representation rather than an authentic expression of self-devaluation, indeed is an accurate understanding of their wellbeing as more dependent, than that of men, on the wellbeing of others. Triangulating qualitative interviews with survey and experimental evidence will help illuminate, but surely not resolve, the question of how women’s voices are ‘heard’. This has wider relevance to the question of subaltern speech more generally which is investigated in the research.

Objectives

The research had 3 aims

1. To contribute an improved understanding of intrahousehold relations, through the basic research needed for effective development policies for more effective poverty reduction and social justice. The research aimed to do this through a focus on the complex nexus of gender identity, poverty and power.
2. Testing of Sen's cooperative conflict model. The research aimed to test the three elements of this model, as well as extend it by integrating anthropological understanding of subjectivities and conjugality into a fuller account of bargaining, breakdown positions and gendered power.
3. Theoretical and methodological advances for development research. The research aimed at methodological innovation through integrating qualitative ethnographic work with both survey data and the results of experimental economics games.

Activities

The schedule of work on this project has had to be altered to accommodate to some setbacks and some opportunities. Initially I had planned a much briefer period of fieldwork but as the work unfolded it was clear that I had an unusually fruitful research environment for the study and I extended the range and depth of the data collection to take advantage of exceptionally good research assistance, willing and open respondents,

and the discovery of a very large quantity of documentary material which would complement and substantiate my primary data collection. The latter was the files on marital disputes kept since 1994 by FIDA, the Federation of Uganda Women Lawyers.

Data collection continued for much longer than expected, and further delays were caused by one of my assistants leaving to have a baby, then her replacement was trained but found to be unsatisfactory and I had to recruit and train another assistant. These staff changes have not impacted on the data quality as I took great care with the training and induction, but it did cause unavoidable delays.

I decided to process the data into both SPSS files and qualitative files. I hoped that this would make the data more useable by others and allow a more rigorous qualitative analysis by the possibility of cross checking, where possible, qualitative material against the broader patterns across the sample, and in the other direction to be able to connect SPSS frequencies to elaborated explanations in the qualitative files. This decision turned out to be very time consuming as I needed a lot more time for data entry and a great deal of time for crosschecking and cleaning the data. Sorting out the queries and questions which emerged from this process required many more trips to collect missing data, clarify ambiguities and so on. It was very worthwhile though, and I am proud of the quality and character of the data that has been collected, and am hoping to see it archived for others to use, and to encourage my students to make use of the data. I see this data collection as investment into a body of material that I will continue to write with for some years to come.

It should also be noted that my time input has had to be spit into 6 month blocks to accommodate my teaching responsibilities at UEA.

Methods

The research has involved a number of methods used to investigate the questions above.

1. The experimental game.
2. The post experiment survey was conducted with semi-structured structured interviews to 56 couples (112 individuals). Husbands and wives were interviewed separately and simultaneously. This group was the sample which I continued to work with as follows
3. Successive interviews with both spouses in the 56 couples, as follows
Interview round 1: Well-being and marital histories
Interview round 2: Livelihoods
Interview round 3: Conjuality and intrahousehold relations
4. Interviews with additional respondents: 25 individual interviews each of divorced women, divorced men, widowed women, widowed men, young women and men who are not yet married, women and men who have been in levirate marriages, and women and men in polygamous marriages. Total of 250 interviews.
5. Focus groups in each village.

6. FIDA: FIDA were mentioned by men and women in the two villages of the study and in following this up I found a serendipitous data source. FIDA is the Association of Uganda Women Lawyers (established in 1974) and it conducts legal support and education for women, has been working in Mbale since 1994 and has a vast store of case notes on marital disputes brought to them over the past 24 years. I sampled and wrote up 150 of these on a systematic basis to give another angle on changing marriage in the area.

7. Interviews with the police, legal authorities, community development staff and social workers in Mbale; attendance at courts where marriage cases are heard, participant observation.

Preliminary results

At the time of writing, data collected and processed and analysis beginning, some directions of the research findings are clear. These are given here in relation to the questions posed by the research project.

What gender gaps are there in achieved wellbeing of spouses? Do women and men have different perceptions of personal wellbeing?

The data collected on Body Mass Index (BMI) will allow us to look at achieved wellbeing in terms of nutritional outcomes, which at this early stage do not suggest significant disadvantage for women in comparison to men. However I am also interested in looking at the differences within the group of women and connecting BMI data to other variables in the study to see if bodily wellbeing is associated with other kinds of wellbeing and power within marriage. Earlier research on gender and embodiment (Jackson and Palmer-Jones 1999) has questioned assumptions about the extent to which gender divisions of labour reflect the imposition of male preferences on passive and subordinated women, and this research will allow further consideration of embodiment and intrahousehold power as it offers detailed material on both spouses in relation to livelihood activities and conjugalities.

The element of the cooperative conflict model which suggests that women have a lower sense of personal welfare than men, and which weakens them in conjugal bargaining, does not seem to be the case in this study. Both men and women express a complex mix of feelings about personal welfare and both emphasise social relations as fundamental to their personal welfare. There has been too little attention to the subjectivities of men in this regard, and the stereotypes of the self-interested man and the altruistic woman will be challenged in this analysis. It is also important to consider the significance of social relations to male perceptions of welfare may not be less than that of women but simply involve a different range of relations – Sen's remarks are made with reference to women's concerns for spouses and children, but without consideration of male (or female) concerns for other kin. Generalisations about degrees of self-perception of personal welfare cannot be based only on the conjugal unit, or it may simply be saying that marriage matters more to women; a conclusion which is methodologically flawed and anyway not necessarily the case for the Gisu.

What are the contributions of spouses to joint livelihoods? Do women and men have different perceptions of member's contributions to household wellbeing?

The picture on changing livelihoods will be traced through the material collected on the livelihoods of the parents of all research respondents as well as themselves. There is a detailed pattern of change emerging in relation to land use and access, the degree to which women are allocated personal fields by husbands, and the extent to which crop choices and marketing are controlled by women. I am also observing connections between the state of the marriage and patterns of land management which shows how land use, eg women's separate fields, can be a spatial reflection of marital relations. Women's separate fields have tended to be seen as a cultural given in particular parts of Africa, and variations explained in terms of land scarcity, rather than as an indicator of the character of intrahousehold relations.

Sen conceptualizes a gap between the actual contributions to joint livelihoods of women and men and the perceived value of these contributions as the second element in his cooperative conflict model. This research will show the important actual contribution made by women to joint livelihoods, and differential and context specific valuations of this contribution made by both women and men. It will show how women contest the devaluation of their contributions, and how difficult it is to generalize about bargaining weakness where the balance sheet of power reflects not only labour inputs and earned incomes, but also contributions to biological reproduction, status and reputation, and emotional needs. These patterns of power based on flows of dependence and independence, which are very changeable, cannot be readily reduced to a metric of material livelihood contributions.

How do the breakdown positions of women and men vary? Do women and men perceive their breakdown positions differently?

The cooperative conflicts model treats breakdown in material terms – eg the possibilities for employment and survival as an independent person in the event of marital breakdown, and suggests that the weaker breakdown position of women has a negative effect on their bargaining power within marriage. I find however that the breakdown position is better assessed in terms of the possibilities for remarriage for women. The situation of divorced men is precarious in terms of both livelihood threats when women's labour is withdrawn, the problems of child care, and the reputation effects in relation to status and standing within kin groups. Marital incompetence is harshly judged by men. The potential breakdown scenarios for individual women and men are affected by many factors – the presence and age of children, the character of relations with kin, the age of women and men and their asset access – many of which are not readily reduced to Sen's terms. Furthermore, divorce is sometimes a means of social mobility for women, when it is linked to a move to another marriage, and thus the breakdown position is not best seen as a failure of cooperation, and an end-point, but as a step towards building another cooperative union.

How does household poverty relate to the individual power of women, and gender relations? Is bargaining power of spouses determined largely by economic power, especially participation in labour and commodity markets?

There seem to be forces operating in both directions of the poverty – power relationship for women. The relative gap in the economic status of spouses is one element of this.

Women married to better-off men have a lot, materially, to lose in the event of divorce and may be less likely to initiate divorce, yet also less influential within such a marriage because of the wealth differentials. Those married to poorer men are more relatively influential and also more likely to seek better marriages. Women thus seem to face a trade-off between material wellbeing in marriage and marital power. And men find poverty and marital instability can be a mutually reinforcing cycle of disadvantage.

A number of factors other than participation in labour and commodity markets are important to women's marital bargaining power – children importantly, but also other social relations and discursive resources.

How is bargaining power within marriage patterned by kinship, marriage and broader social relations?

Complex relations between kin and spouse affect both husbands and wives. Women have some interests in promoting the independence of the conjugal unit, against the demands of in-laws, and also rely on the social relations of their own natal kin in the event of marital breakdown. They therefore build the conjugal unit up in some ways, whilst undermining it in others – such as redirecting resources – food, money, labour – from conjugal units towards investments in natal kin.

Husbands fear their kin and trust their spouses in an inversion of the relations predicted by Mary Douglas (2002) for societies such as the Gisu. Curiously for the patrilineal Gisu, it is women, not men, for whom kinship offers security, and it provokes reflection on the significance and entailments of patriliney. Feminist anthropology has long critiqued kinship models based on male perspectives, and this research will analyse the weakness of patriliney and the potential strengths of marginality (Tsing 1993).

I also look at social relations of friendship and solidarity, age or circumcision sets, and patronage relations, to evaluate the ways intrahousehold power reflects and facilitates wider social relations. Marilyn Strathern points to the particular way that an individual man is backed by a collectivity of men standing behind them, as a basis of male power, and these aspects of how individual power connects to collectivities, social groups and networks will be pursued in the research, as part of the larger project of understanding well-being in more social relational ways.

What differences are there in articulated gender relations, and allocation behaviour as revealed in experimental game behaviours?

The first set of answers to these questions are dealt with in the nominated papers. The analysis of the data collected since the games were conducted allows me to explore the space between the way Gisu conjugal sharing is expressed in verbal testimony, and in game play.

As well as the relationship between what people say and what they do in the game, there is another layer here – of the relationship between these two elements and external reality of what they actually do in everyday life. Experimental games have quite a complex relationship to external validity – the extent to which game play reflects actual everyday behaviour – and because of the model of the laboratory it has not been discussed as much as perhaps it should have been. The substantial data collected beyond the

immediate de-briefing interviews allows a much more substantial analysis of external validity than has yet been offered.

How far does the cooperative conflict model help understand differential wellbeing outcomes and gender inequality in a rural African context?

It looks likely that this analysis will conclude that the three elements of the cooperative conflict model have some validity in explaining intrahousehold power, but are far from an adequate account of such relations, which turn to a large degree on social and cultural dependencies and interdependencies rather than material bases. The model neglects the subjectivities of men and the vulnerabilities created by the implications of hegemonic masculinities. The research also will show the ways in which representations and stereotypes are used in need claims, and these may easily be misunderstood as accounts of how things are, or of powerful social norms.

Other models, such as the separate spheres model of Lundberg and Pollack (1993) is possibly a more useful approach since it focuses not on divorce as the implicit threat point, but on the smaller scale everyday ways in which cooperation and between spouses is built, reproduced, eroded and changed. My data includes a great deal of material on the ways in which wives and husbands are able to influence their spouses and make their preferences effective, and this will allow an investigation of the separate spheres model in a developing country context.

The research findings will be used to address a wider range of issues than those posed around cooperative conflicts and other household models in economics, which are focused on here since they were the original research questions. The debates in feminist anthropology, and gender and development, about marriage and wellbeing pose a number of questions about agency, masculinities and the investments of men in marriage, and how best to theorise this most fundamental and complex form of human cooperation.

What methods, and combinations of methods, are most effective for studying gender relations within domestic groups?

The problems of women's testimony, and feminist epistemologies, are pursued in this research, which aims to compare speech with action in order to question assumptions about silence, talk, power and weakness. Whilst working on the data collection I have written two papers on the problems of testimony (see abstracts in appendix), and I submit as one of my nominated papers a piece on experimental methods which uses my de-briefing interviews to deepen our understanding of the game results, and this is a significant contribution to methodological developments across several disciplines.

This is dealt with in detail in the nominated outputs.

Impacts

This is basic research and aims primarily at developing better understanding and methodologies rather than direct recommendations for policy or development interventions. I expect the impact of the research to be assessed through citations of the published outputs in the future. I think the ESRC might wish to consider assessing impact not only in the immediate end of award report but after a time period of 5 years.

I will also hold a number of seminars for development organisation staff to disseminate the research to those who will use the findings to rethink current development policies.

Outputs

Articles submitted to journals:

1. Jackson C (2008) 'Experimental games in developing countries: what is going on?'
2. Jackson C (2008) 'Reflexivity and actor-orientation in experimental game methods' [nominated paper]
3. Jackson C (2008) 'Experimenting with intrahousehold allocations@ cooperative conflicts in a Ugandan context' [nominated paper]

Articles written and yet to be submitted to journals (abstracts in Appendix A of research report)

4. Jackson (2008) 'How does the subaltern speak? Gender, speech and participation in development'
5. Jackson (2008) 'Triangulating testimony: speech, silence and resistance'
6. Jackson C (2008) 'From conjugal contracts to conjugal performance'
7. Jackson C (2008) 'Thinking about gender and poverty in the C21st'

Planned outputs for 2009-11:

1. Journal collection, and edited book edition, with other researchers on conjugality and development. See appendix for content
2. Research monograph Marriage, Wellbeing and Power .
3. Further journal papers.
4. Research methods workshop and book.

Capacity building

The challenge of capacity building in the context of a research project is a difficult one and yet very important. The project has been exceptionally successful in capacity building in relation to the main research assistant in Uganda, Joshua Balungira, who has developed a wide range of research skills and competencies during the conduct of the project. He was an unemployed social science graduate of Makerere University, living in Mbale his home town where he is the head of household, as an AIDS orphan, supporting younger dependent siblings. Joshua has worked really well and has learned not only data collection through our primary data collection, but also widened his conceptual knowledge through the books and articles I supplied to him, developed skills in data processing and learned SPSS data entry, and in qualitative data management.

Given the very low chance of winning a job after the project ends – employment in Uganda is largely governed by ethnicity and family connections (and he is of a minority tribe and has no well-placed extended family) – I am helping him to start a small research services business to offer support to other research projects in the area. I will help with introductions, registration with agencies and on-going support after the close of the project. Joshua Balungira has already had two further research jobs and one consultancy offer as a result.

This is not a conventional tale of capacity building – of those already with jobs in research institutions – but it is an important issue to address; ie how can one support the research assistant employed just for the duration of the project?

Future research priorities

1. Uganda: The FIDA files:

Locating an office full (over 10,000) of substantial case histories, written in English, dealing with marital disputes since 1994 when the FIDA office was opened in Mbale, was a startling and wonderful discovery. I sampled some for the purpose of this study but would like to revisit to help FIDA raise funding to archive this extraordinary resource for gender researchers

2. Comparative Research: as mentioned above I am now engaged in applying these methods to a large interdisciplinary study in India, Nigeria and Ethiopia. The Nigeria study will enable me to revisit and restudy the same locations of my PhD research on gender relations amongst the Hausa in 1976-9.

4684 words

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Appendix A: Abstracts of written papers not yet submitted to journals.

TRIANGULATING TESTIMONY: SPEECH, SILENCE AND RESISTANCE

Understanding what women say is a complex matter, approached through the critique of the silent and passive 'Third World woman' in Mohanty, the questioning of the subaltern voices of women by Spivak, the debates about false consciousness in Sen, Kaber, and Kandiyoti, the case made by Ardener for mutedness and by Gilligan for our deafness to women's voices. Speech is a particular problem in researching women – not because of mutedness, but because the uncertainty of intent and meaning in all kinds of talk is particularly acute in relation to subaltern groups. Evidence based on direct testimony contrasts strongly with not only poetry, myths, stories and other creations, but also experimental evidence. In this paper I attempt to disrupt the dualisms which connect speech to power and silence to weakness through a closer look at mutedness and silence, and then look at gendered forms of resistance which involve silence and communication not based on direct testimony. Learning to read these kinds of 'talk', triangulated with testimony, may throw new light on the subordination of women.

HOW DOES THE SUBALTERN SPEAK? GENDER, SPEECH AND PARTICIPATION IN DEVELOPMENT

Development studies has become very preoccupied with participation as the primary means by which progressive social change is facilitated and delivered in developing countries and all policies, programmes and projects have to be designed and implemented through processes involving beneficiaries in consultative and decision making bodies. Whilst the participatory turn has been much debated, there has been very little challenge of the foundational dualism in social science which divides silence and speech, and equates the former with weakness and the latter with power. Talk is the way that interests are defined and defended and demanded. In feminist theorising too, the subordination of women is firmly tethered to their lesser ability to 'speak'. The implications, for development practice, of questioning speech as the ideal form of participation are discussed in relation to the participation of women in resource user groups and elected bodies, and to research practices for gender and development.

FROM CONJUGAL CONTRACTS TO CONJUGAL PERFORMANCES

The terminology of contracts in relation to conjugality is perhaps an unfortunate one, since the originator of the term 'conjugal contract', Ann Whitehead proposed a characteristically useful and flexible concept to capture the expectations carried into marriage by women and men and which forms the backdrop for the negotiations, claims and complaints through which marital cooperation operates, or founders. However, the implications of fixity and stasis in the notion of a contract, albeit implicit, is in some ways misleading. This paper explores the evidence for the ways in which women make use of the many norms and ideas about marriage in their particular cultural contexts towards a creative interpretation of such 'contracts' and a remaking of their meanings over time. The ways in which masculinities are understood and manipulated, and ambiguities

exploited, are common in many contexts, which are outlined here to establish the active engagement of wives in the remaking of the meanings of marriage, despite their apparent disadvantage in formal expositions of marriage norms.

THINKING ABOUT GENDER IN THE C21

Is gender disadvantage a type of poverty? Can we understand the disadvantage of women as based in the especially deep poverty that they face? These questions during the 1990s arose in gender analysis of development because of the ready assumptions made by both scholars and agencies that the answers to these questions was, yes. This paper will briefly review the arguments made in the first round of this debate, and extend the discussion to include a discussion of how gender analysis relates to more recent concepts of poverty – wellbeing, capabilities and functionings, social exclusion and MDGs, and to developments in gender analysis, in particular to masculinities and to subjectivities. It argues that thinking about gender has enriched the ways we conceptualise poverty, and in favour of an analytical separation between the two fields.