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MAKING CHANGE HAPPEN

Citizen Engagement and Global Economic Power

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❧ BACKGROUND

In August 2005, a group of advocates, popular educators, development practitioners, researchers and community and labor organizers came together from around the world to reflect on the practice and challenges of global economic justice work. Co-sponsored by Just Associates, Action Aid International, and the Institute of Development Studies (IDS)-Participation Group, the meeting explored strategies for making global economic policy processes more democratic and responsive to a people-centered sustainable development agenda.

An overarching concern that motivated this gathering was how communities can participate more effectively in defining economic policies and priorities—including trade, debt, structural adjustment, privatization, and environmental and labor standards—that affect rights and livelihoods. The workshop considered ways of strengthening and bridging diverse strategies—ranging from advocacy and campaigning to community development, organizing and popular education—with a focus on the crucial task of building meaningful citizen influence and power from local to global arenas. Case studies about popular education, organizing, advocacy and campaigning grounded discussions and provided a rich sense of the possibilities and challenges involved in economic justice work at all levels.

In particular, the dialogue focused on:

❧ **Trade-offs and tensions between policy advocacy and grassroots organizing strategies:** experience indicates that education that begins with local issues and combines political analysis about root causes with organizing can be an effective way to engage people to think about and mobilize to confront injustices produced by the global economy. Yet these longer-term grassroots political strategies seem to get overtaken by short-term efforts that emphasize policy and media advocacy disconnected from a constituency. What are some of the strengths and weaknesses of NGO-driven advocacy and campaigns with regard to citizen engagement? How do we combine and carry out long-term organizing, education, awareness-raising and advocacy in the context of the changing global economy given the shifting roles and demands on governments shaped by the dynamics of neoliberalism?

❧ **Finding the balance between ideology and information:** Strategies that rely on the delivery of information tend to overlook the insidious way ideology shapes people's sense of what's happening and what they can do about it. In some cases, facts and analysis—though vital —can disempower people and

local organizations by reinforcing the notion that only experts know the way. What can be learned from current and past practice that might enable us to better balance and combine different strategies at different levels?

❧ **Lessons from popular education:** What do we mean by 'popular education,' particularly as it relates to demystifying and addressing economic power? 'Economic literacy' is widely used to describe very different approaches to education with different aims and audiences, ranging from simplifying economic terms for advocates to exploring economic roles in the home. How is economic education embedded in longer-term political organizing different than education in workshops or training initiatives that are not explicitly connected to a particular struggle—in terms of content, process and impact? How can we better communicate about these distinct education strategies when catch-all terminology blurs important political distinctions?

QUICK GLOSSARY OF KEY AND CONTENTIOUS TERMS

The discovery that the key words in the conversation lacked any common meaning led to the creation of a working glossary of terms that were used throughout.

Citizen
We use the term "citizen" in an active sense, beyond the notion of the legal status bestowed, or not, by states but rather referring to all people who are actively claiming voice and accountability in the public arena.

Ideology
Core beliefs and values about what is right, what is wrong, what is "normal." Shaped through a mix of conscious thought and information and subconscious processes of socialization, ideology shapes peoples attitudes, actions and relationships with others. Ideologies of particular concern to the conversation included neoliberalism, consumerism and religious fundamentalisms.

Organizing
Deliberate actions intended to bring people together to develop the leadership, strategies and collective capacity necessary to confront a common issue or push an alternative justice agenda. This often refers to workers, low-income/poor people, minorities or women who've been disadvantaged by the system or excluded from the decisionmaking table. Ideally, in the participatory process of working for needed changes, people involved take on greater leadership in addressing the problems and forces that undermine their communities or workplace, and build organizations bound by mutual respect, trust and common purpose.

Mobilization
Engaging people as political activists through actions that build and use the strength of organized numbers to make their demands known and influence those in power. Effective mobilization usually requires extensive organizing. However, short-term media-oriented campaigns can reduce mobilization to "turn out," meaning the appearance of many people who often are not informed about the political goals of the action.

Political
Refers to questions of power, who has access to and control over resources and decision-making, whose interests are represented or not at all levels including within households. We are not referring to political parties, or necessarily even to official government spaces, though they are included in this conception of "small p" political.

Popular Education
A political education process and methodology that aims to help people question the systemic roots of inequality, including racism, sexism, and economic exploitation as it takes shape in their lives and communities. The learning process is not top-down or expertise-driven but rather is more problem-posing in nature, often using images or skits to present familiar situations to generate dialogue based on people's lived experiences. By probing local realities, facilitating access to key information and ideas, it helps people connect a critical political awareness to a sense of their individual and collective power and take action for change. (See "Reclaiming Popular Education" on page 10)

Economic Literacy
Refers to basic economic education for workers and citizens to better understand and critically question the logic and politics of economics and economic policy. Approaches vary widely – in some cases, the "ABCs" of economics are geared to enabling people to accept policy compromises or simply understand big ideas like "globalization." Other popular education approaches aim to demystify the expertise of economics and develop a critical awareness of the ideologies and political agendas embedded in economic policies. Often this latter form of political-economic education is part of an organizing effort to promote an alternative agenda.

Citizen

We use the term "citizen" in an active sense, beyond the notion of the legal status bestowed, or not, by states but rather referring to all people who are actively claiming voice and accountability in the public arena.

THE GLOBAL LANDSCAPE SHAPING ECONOMIC JUSTICE

In a brief collective contextual analysis, participants identified the following trends and forces impacting their work:

ᏚᏚ **Neoliberalism or "free market economics" continues to be a pervasive, powerful force.** Despite pronouncements about the end of the "Washington Consensus," it remains the overarching paradigm shaping policy priorities and perspectives on economic development, the role of the state and poverty. Over the last two decades, it has significantly shifted the balance of power between the private sector, governments (see below) and civil society. While US and European transnational corporations increasingly dominate economic and political affairs worldwide, regional competition (e.g. between Kenya and Uganda; Nicaragua and Honduras) has also created tensions between countries. Much local small-scale agriculture and industry has disappeared, losing out to competition from foreign competitors and to China.

ᏚᏚ **Government capacity, and to some degree sovereignty, has been reduced over two decades of liberalization, deregulation and privatization combined with increasing indebtedness.** While corruption continues unabated at all levels, even reform-minded governments find themselves squeezed between the growing demand for basic services and rights, and the need to attract foreign investment and the conditionalities and demands of International Financial Institutions (IFIs).

ᏚᏚ **Continued privatization of essential services like water and healthcare has neither expanded nor improved services, and has increased the cost for poor and low-income communities generally.** In some areas, NGOs have taken over the role of government in the delivery of services. While benefiting the communities served, this raises larger questions of how governments regulate and coordinate such efforts, and ensure universal access.

ᏚᏚ **Stable livelihoods and decent jobs are fewer and increasingly precarious, in large part due to the mobility of capital.** The inequality gap is increasing within and between countries further fueling migration. Immigration laws have failed to keep pace with the liberalization of capital breaking up families and communities.

ᏚᏚ **The political landscape everywhere is affected by the complex relationship between US unilateralism, growing militarization around the world, and religious fundamentalisms; each force seeming to draw strength from the others.** The commercial and media reach of the West – with a particular brand of individualistic consumerism, is seen to exacerbate social conservativism. These trends have narrowed the space for civil society to advance economic justice and human rights issues. In many communities and regions, they've generated a backlash against women's rights, in particular. While more women are drawn into the formal economy, it nevertheless is more difficult and risky to defend women's equality, especially reproductive rights.

ᏚᏚ **Civil society groups concerned with rights and development** are increasingly dominated by NGOs (especially large INGOs) as traditional labor unions struggle to adapt to the changing global economy. Corporate culture has permeated the NGO sector with increased emphasis on efficiency, results-based management and references to "market share." In contrast, new social movements are emerging around resources and services, while long-time peasant and indigenous movements have gained new strength and size through global connections. The World Social Forum processes seem to inject new energy into civil society efforts and provide needed space for bridging the NGO-movement divides.

ᏚᏚ **NGOs face difficult trade offs as they seek to scale-up the impact of economic advocacy work.** Some fear that grand-scale campaigns such as the Live 8 concerts and Global Call to Action Against Poverty are contributing to de-politicization and further reinforcing "NGO-ization" of struggles for economic rights, while others argue that such actions will build larger constituencies for change.

ᏚᏚ **This panorama extends the contours of economic justice work beyond the question of policy reform to the more complex realities of how people's lives, worldview and sense of their future have been shaped by these trends.** It is on these issues of ideology, fear, patriarchy and the challenges of survival that the work of promoting citizen engagement needs to look more closely.

CHALLENGES AND OPPORTUNITIES FOR CRITICAL ENGAGEMENT

What do campaign experiences tell us about the challenges and opportunities for critical engagement by citizens with global economic power?

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I n the last decade, increased openings for civil society participation in economic policy processes have presented opportunities for economic justice advocates to make their case in a wide array of spaces—consultations on Poverty Reduction Strategies, WTO and regional trade negotiations, IFI risk assessment panels, and more. But economic decision-making is highly politicized and access to policymakers does not necessarily translate to influence. Policymaking is fragmented geographically and the "real" decisions often happen behind closed doors. As a result, challenges surrounding global and regional economic advocacy and campaigning—including issues of when and how to engage, who represents whom, and disconnects from local realities and people—have come into stark relief.

Campaigners and researchers participating in the meeting shared their experiences and questions on what campaign experiences tell us for connecting local realities and citizens to global economic decision-making processes.

Representation and participation in global campaigns pose multiple challenges. As overarching economic policy issues are increasingly decided globally, INGOs have expanded their involvement, often seeking to act as intermediaries and advance the rights and needs of disadvantaged communities far removed from global policy. Many concerned about economic justice question how INGOs can ensure the authentic voice of the communities marginalized by poverty and power that they seek to "represent." Highlighting the fact that INGOs and marginalized groups do not have the same interests, one researcher described the explicit "buying off process" he saw around trade agreement negotiations where only "supportive" civil society groups were invited to participate. Those excluded were the groups directly with and representing people most affected by the agreements.

The power dynamics among organizations working at different levels are complex. Who makes final decisions on positions and priorities? Who gets credit? Some participants noted the **pressure for branding**—gaining organizational name recognition through a campaign—which helps with fundraising, tends to undermine collaboration and coalition-building. It also limits INGOs' willingness to take certain positions and can generate resentment among partners. One action research project found that INGOs are seen as more "careerist, corporate and in the business of pushing their own agenda," by the local and national organizations they need to ally with. National level campaign experiences have also illustrated problematic disconnects between NGOs based in the capital city and groups working elsewhere in the country. As one organizer pointed out, only when those disconnects are bridged do "we have enough leverage to make a serious change."

The promise of reaching large numbers of people through **mass media and communication technology** has also contributed to the displacement of local organizing and action in many cases. Media campaigns rely heavily on messages that raise general concern about the issues but rarely go beyond emotion to a deeper questioning about structural causes of poverty and injustice. Some commented that it has become much easier to produce "attention-grabbing media stunts" with celebrities than to organize and educate a base of support. A constituency, in this sense, increasingly refers to the thousands who attend a big splashy event, not an informed active membership. At the same time, public visibility that such media campaigns lend to issues of poverty and injustice reach new audiences and create valuable political opportunities for change. For example, media attention was crucial to the early successes of the 50 Years is Enough coalition, bringing the disastrous impact of IFI policies to the light of day (and even led to the creation of a Public Relations department in the World Bank).

As policy engagement increases, global advocates and campaigners, especially inside large INGOs, have felt a need to build their **expertise and specialization** to produce technically sound arguments and PR-savvy messages. Some participants pointed out that overspecialization within INGOs is an obstacle for developing a multi-dimensional, political approach to poverty and inequality. Staff have distinct professional skills and may not

One participant compared the evolution and fragmentation of civil society as it seeks to engage in global advocacy to changes in automobile assembly and production over the years. Before, several workers assembled a single car at a time, but today, since the car and its parts are produced and assembled in so many different places, only the designers have knowledge of the whole process. The people making the car lose their creative connection to and ownership of the production process, and become a cog in the disconnected system. Ideas and designs are only generated and shared at the top. Similarly, the policy advocate at the global level is the gatherer and keeper of knowledge about the whole advocacy process — the issues and agendas remain disconnected from the people and situations that are meant to drive or at least benefit from the change process.

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"The question is how do we re-ignite the energy, role and power of citizens, workers and communities who are distant from the policy advocacy – structurally and methodologically?"

see how their work relates to staff in other roles and locations. They have their focus and responsibilities but don't see the overall strategy. The campaigning department may be far removed from the policy department which is likely very far removed from the "field programs" and the fundraising department. This "silo-ization" in large institutions makes it difficult for different parts of the organization to sustain a common perspective, inform each other or work together.

International and national campaign work, lobbying and policy influence often create more opportunities for visibility and create the sense of being close to power. As a result, many INGOs have shifted more resources into high-profile activities. Donors have exacerbated this imbalance by emphasizing "measurable outcomes" (often defined as policy gains) in the short-term, with little support or recognition for the long-term, incremental change strategies so critical for work with women, peasant farmers and low-wage workers among others.

Global campaigns operating on one-two year time frames not only raise unreasonable expectations about the scope of change achievable in that period, but the pace of the work poses enormous challenges for in-depth relationship-building that is key to engaging a broad range of organizations and people.

Campaigners and researchers who shared their experiences noted several key lessons:

- Building strong, broad alliances at multiple levels (local to global) is key and resource-intensive but the least supported by donors;

- Decentralization and flexibility of a campaign is important to make it relevant to local efforts and organizations, and demands creative, sustained coordination and communication;

- Large-scale campaigns that garner major media coverage serve an important purpose in getting issues in the public eye and on the agenda; however, to transform visibility into meaningful change, it is necessary that media work be closely linked with less visible education and organizing to support community leadership and deepen and sustain engagement in ways that are relevant to each context and needs;

- At the same time, it is also important to move beyond "sound bite" issues to enable people to question the ideologies and structural power dynamics that obscure the real interests behind economic policy and prevent people's own issues from reaching the policy agenda.

Jo Fox shared insights from Oxfam's Big Noise Campaign that, "calls on world leaders to change unfair trade rules that keep millions of farmers across the world in poverty." The centerpiece of the campaign was a petition-drive that gathered more than 7.7 million signatures across the world to be delivered to world trade ministers during the WTO Ministerial Conference in December 2005. The campaign mobilized supporters in 20 countries, and enabled governments and civil society to work more closely together around trade negotiations. When initial progress was very limited, Oxfam campaign staff made several adjustments to address challenges of representation and participation. The campaigners began to ask themselves what issues were likely to resonate locally, that reflect unfairness of international trade rules, avoiding a "one size fits all" prescription. Eventually, they also prioritized working with diverse groups and alliances with existing constituencies that could be informed and mobilized at national levels.

Brian Kagoro, of ActionAid Africa, offered a critical perspective on the Global Call to Action against Poverty (GCAP) that his organization has promoted. He began with important achievements, such as:

- It has put poverty back on the global policy agenda post 9/11;

- It has a presence in 70 countries and has created access to world leaders;

- There is consistent effort to expand the GCAP agenda from aid, trade and debt to women's rights, basic services, human security and accountability of national governments.

However, several challenges remain,

- One critique of this campaign has been that it is a corporate NGO "invited" space, objectifying people in the Global South through a discourse loaded with pity and charity;

- There are also concerns that the use of celebrity figures displaces the activism of a conscious base;

- Power between the INGOs involved and other types of civil society actors is unequal and has tended to marginalize social movements.

- Nevertheless, GCAP has created a political space that can/must be filled by more social movements.

DEMYSTIFYING THE POLITICS OF GLOBAL-TO-LOCAL ECONOMIC POLICY

"Economic justice goes beyond a technical policy task."

Not surprisingly, global and national economic advocates tend to focus on the production of solid evidence as the basis for challenging policies that privilege wealthy interests and to gain support for alternatives. While good data and well-reasoned arguments are important, powerful economic and political interests – often working under the policy table, use a myriad of strategies to de-legitimize seemingly incontrovertible arguments and alternatives. Even though good information may help win short-term policy gains, information alone will not ensure that policy words become meaningful change on the ground. More importantly, neither does "good information" necessarily spur people to act.

A founder of the 50 Years is Enough coalition shared an anecdote about a meeting with several IFI officials who challenged a 50 years' representative to come up with economic alternatives to what the IFIs were promoting. Rather than become consumed with technical policy proposals, he recognized it as a political challenge so the response was easy: "by investing in people, creating jobs, and ensuring basic healthcare and education."

Economic justice goes beyond a technical policy task. Rather it is a long, contentious competition around power and diverging interests that determine what is considered 'fair' and effective in the use and distribution of economic resources. It is a struggle rooted in ideology—core beliefs about what is right, what is wrong, what is "normal" and who decides how to solve economic problems. These beliefs shape the behavior and expectations of citizens as well as powerful political, economic and cultural institutions. They are also the source of tension within and between organizations struggling for social justice and with the people they seek to serve.

One researcher described the experience of Bangladeshi women factory workers as an illustration of the complex realities produced by economic globalization and the highly political and contradictory nature of economic struggles. With a flourishing export-oriented garment industry in Bangladesh, large numbers of jobs have opened to women. Working conditions and wages are poor, and these women workers are extremely vulnerable in the face of fast-moving global economic forces beyond their control. At the same time, their situation as workers has, in effect, generated a quiet cultural revolution in communities where women were long discouraged from going outside the home to work. Their factory jobs are considered vital in the garment industry and by government, and their role within the family has been transformed into breadwinners. In addition, local NGOs reinforce and build on the changes the women experience by bringing them together to discuss housing, health, and other concerns. In contrast, she said that INGOs seemed to lack the nuanced analysis of the local realities, and often failed to recognize and respond to such opportunities.

Ashish Shah, from ActionAid Kenya, shared insights from the Sugar Campaign for Change (SUCAM). Initiated in 2001, SUCAM sought to better understand and respond to growing poverty in the sugar-producing region of western Kenya. The core campaign team was made up of "professionals"—academics, NGOs, an ex-MP—and one sugar farmer. It was explicit about a focus on technical knowledge, "our assumption was that good information alone would touch the psyche of farmers, which would motivate them to organize themselves." As the campaign advanced, it became apparent that the farmers were facing an overwhelming array of challenges: price setting, inadequate protections, nil political influence at the national level, etc. As Ashish reflected, "It would have been easy to lobby on the subsidies or the weighing at the local level. But what is the issue? The structural issues that came to us were that farmers did not have any control over the way the industry was moving and if there is anything to do in addressing these problems, we have to work here first.... to change the power dynamics. We looked at the politics side of things to be able to address the economics."

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❧ WINNING AND BUILDING

"While policy is critical, we need to broaden our understanding of winning so that winning and building are not at polar opposites. The vital link between them is a long-term vision."

A recurring theme in the conversation was the tension between short-term "wins" and strategies that help to build collective people power over the long haul. A few participants described organizing experiences that didn't achieve an explicit "win" in terms of policy gain, but that were extraordinarily successful in bringing people together to deepen their analysis of the situation they face and to begin to take collective action to address those problems. Others discussed the limitations of policy change without implementation or without furthering deeper social change. A key insight was that the definition of **"winning" needs to take into account what it takes to build the political clout** of groups that have been disenfranchised from political processes – including helping them to counter the feelings and structures of powerlessness and the ideologies that underpin them. These range from beliefs about who's to blame for unemployment and poverty and the role of government to whose rights count in society.

This is a complicated, and often undervalued task because it involves tapping how people feel as well as what they see the world and what they know to be true. However, as Susan Williams describes on page 8, this was a critical step in getting people to recognize their power to make a difference and beginning to seek out information and strategize.

Jojo Geronimo spoke of his experience working with the largest US labor union around the 2004 presidential elections.

"Unions are good at winning short-term campaigns, but does winning campaigns build a social movement? What's worse does a narrow policy definition of winning undermine the potential for movements?" He shared some of the frustrations with the organizing effort that was so focused on defeating a particular candidate, that opportunities were missed to significantly strengthen the people power to support labor's broader objectives as well. "How would we defeat Bush but also talk about the broader right-wing social agenda and neo-liberalism during that process?" Enormous resources were poured into communities, but not through existing channels of experienced organizers and community groups with connections to people. **"Education can be a tool to give people the skills and commitment to carry out campaign tasks but often the education staff is sidelined in an organization primarily interested in winning—and winning has only to do with short-term legislative victories."** Jojo noted that organizing around the elections with a view to building power over the long term would be about fostering worker solidarity to raise class consciousness and ultimately create a broad-based organized political change effort.

Ashish Shah described another dimension of the SUCAM experience (introduced earlier) that underscores the critical importance of long-term vision and strategy in shaping the actions and tactics of economic justice efforts. SUCAM organizers saw the sugar farmers facing so many problems that it was difficult to choose one that could really challenge the core of the issues. In fact the farmers were bombarded with problems at multiple levels: "Imagine yourselves as poor farmers. ActionAid says the Cancun WTO Ministerial is happening so sugar farmers focus their attention there. While farmers are working at that level, the government negotiates a bad trade deal so they have to focus on EPAs [export agreements]. When they are looking at the national policy, the G8 distracts… then corruption [at the local level]… then aid conditionality. All of this keeps eating at the farmers political and economic choices because we're not touching on the core." The farmers were constantly responding to the multiple symptoms of a much deeper problem of governance and exclusion from decision making.

"Why talk about getting a 3% increase in wages when housing costs go up by 20%? What is the use of negotiating for job security if the entire operation is contracted out off shore? Connecting workplace issues with social issues—like racism and sexism—is crucial in achieving both goals."

Susan Williams, from her work with the Tennessee Industrial Renewal Network (TIRN) in the US, shared one of her organizing experiences with communities that were facing a wave of factory closings in the early 1990s during negotiation of the North American Free Trade Agreement (NAFTA).

Union and community organizers understood that NAFTA would play an important role in the lives of workers and citizens. As part of a larger popular education and organizing effort to help people understand how the political and economic system was undermining their jobs, the organizers arranged exchange visits between workers from factories in Mexico and those in Tennessee, where many factories had been shut down, often to re-open in Mexico. "This was very sensitive work because of the tendency for people who've lost their jobs to blame the next set of workers rather than the company."

Often, the exchange visits would take place between workers of the same factory that had closed in Tennessee and relocated to Mexico. Through the sharing of personal stories and conversations about wages and working conditions, workers from both countries became powerfully aware that the economic system was not benefiting either side. Visits were structured so that the same workers kept going back and built on past conversations. "People experienced a lot of pain and anger through these experiences...but it also gave them a sense of connection and solidarity that's energizing."

Organizers also brought workers from Canada to talk with US counterparts. These conversations around NAFTA were taking place all over the US in local communities. Meanwhile, advocacy groups in Washington, DC that worked on campaigning and lobbying connected with these community groups and shared information.

In the midst of these efforts, NAFTA was being secretly negotiated between the US, Mexico and Canada. NAFTA was eventually passed through behind the scenes maneuvering. "We really did affect the political views of the people in Tennessee but in the end, the corporate machine came out and bought the votes of Congress. It was visible and we all saw it." Talking about how the loss happened with the communities was an important part of the consciousness-raising work, Susan notes, "to help people understand how powerful the corporate interests are and what mechanisms they'll use to win."

As the story to the right illustrates, balancing the winning with building people's power often places policy issues on the back burner in the short-term. The notion of winning is expanded to include new ways of thinking and new forms of leadership. Timeframes for change move beyond two years to a span of a decade.

EDUCATION APPROACHES THAT CHALLENGE IDEOLOGIES AND INTERNALIZED OPPRESSION

"Education is about creating a space where peoples' selves can emerge and they may do things that run counter to authority."

Making participation and representation work requires citizen education and organizing that build community leadership and enable people to engage meaningfully. The best of popular education seeks to empower people to question and unpack myths and information generated by dominant ideologies using what they know from experience and new information (this is referred to as building critical consciousness). This process is integrated into long-term organizing so that learning and action are a perpetual process that builds collective capacity for political influence. Popular education is not a cure-all, and like many other strategies/methodologies it is sometimes converted into a stand-alone technical fix. While popular education historically grew out of resistance struggles, it is sometimes reduced to a set of participatory techniques devoid of a deeper analysis of power and disconnected from a broader political process or vision. Some educators and organizers have become disillusioned as a result, dismissing the importance of some of the processes and analysis associated with popular education. (See "Reclaiming Popular Education" on page 10)

"Those who lost their jobs blamed themselves for their economic situation…People often feel intimidated by too much technical, economic information. All of the workers came with so much knowledge rooted in their own experiences and it was important to validate it along with the more 'expert' knowledge…that we had to work hard to find and understand."

Bobby Marie described the evolution of some transformative education experiences in South Africa. In the 1970s, the South African liberation movement was crushed and the apartheid regime was very strong. In this political environment, a new student-led movement emerged that brought in ideas from Steven Biko and Black Consciousness that asserted that oppression not only operated in explicit ways but also resided "inside our heads." Education and organizing efforts took up this challenge: "You've got whitey in your head and need to get him out. Only once the oppression was dispelled within ourselves could we be creative and create in our own spaces." The movement spread rapidly. "Within about 4 years, high school kids challenged language – the dominance of Afrikaans in schools. They asserted, 'We will not learn the language of the oppressor. Culture was a powerful weapon in the way of the arts'." An important realization was that the problem in South Africa at that historical moment was about race, as much as it was about economics.

In the 1980s, the movement was increasingly dominated by workers and trade unions. In this highly politicized context, organizing and education were intertwined and unions created space for reflection as a form of organizing. The energy and action generated by these education efforts had to do with the fact that they were located within a larger struggle and movement.

Today, most of those union leaders are in government and in ministries dealing with practical macroeconomic problems. The focus of the unions has shifted to engaging and negotiating with government on macroeconomic and industrial policies. As a result, the education is technical, aimed more at helping workers understand policy compromises and choices rather than question them politically.

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"Information about the global economy alone will not change or engage workers in a way that helps them take hold of their situation over the long-haul."

Historically, popular education focused on enabling people to critically understand and act to change local realities. Today an added complexity is that much of what happens locally is shaped by outside dynamics and agendas that are largely invisible and inaccessible to communities. Increasingly educators and activists working on economic issues must gather accurate information that is often unavailable to people at the local level to help them understand economic policy and power dynamics well enough to identify targets and develop sound strategies for change. This involves an iterative process that systematically combines information and technical knowledge with personal, experiential knowledge, helping people to rethink their assumptions and actions. Workshop discussion and examples surfaced several common aspects of education methodologies that seek to empower people to question and understand economic and political power:

ଓ Immediate economic problems serve as an entry point for educators and organizers because they can motivate people to come together, raise questions and organize. Experience shows that it is often less effective to start with policy or a discussion of rights –that may initially seem too abstract and removed from local realities to engage people. However, eventually new ideas and information can help people gain a more critical awareness and analysis of their situation and be motivated to take effective action with others.

ଓ Telling stories about how other communities have fought back helps "to inspire people against a demoralizing situation."

ଓ Sharing personal experiences, tapping feelings, and building direct relationships, is crucial for strengthening a sense of solidarity that is energizing for people engaged in local and global economic struggles.

ଓ Education strategies should help people question what they perceive as inevitable and ask where certain trends and changes are coming from?

ଓ It is also useful to help people re-capture their sense of history, to remember past experiences where people power made a difference and appreciate progress as well as challenges. This reinforces possibilities for change.

ଓ A critical element of an empowering education and organizing process involves reflection on race, gender, sexual orientation, and other differences that shape internalized oppression. Movement-building over the long-term needs to confront and transform prejudices and inequalities that plague and weaken citizens and their organizations if people are going to come together around common agendas.

"…the education and organizing successes were based on what the workers wanted to do. People who *feel* like they can do anything can do amazing things."

"Education strategies should help people question what they perceive as inevitable and ask where certain trends and changes are coming from?"

Economic Education for Action initiative

Lisa VeneKlasen discussed the Economic Education for Action initiative, a JASS – Solidarity Center* project carried out with labor union educators, leaders and members in Serbia and Montenegro from 2003-2005. When it started in 2003, people in the region were struggling to recover from the loss and dislocation produced by the war, and the trauma of losing family and friends, homes and jobs, cultural and historical connections to what was the former Yugoslavia. Similarly jolting, the World Bank and International Monetary Fund were carrying out an accelerated economic restructuring process. Three-quarters of the loans Serbia and Montenegro received were structural adjustment loans. In 2004, the unemployment rate hovered at 35%, corruption and political violence continued rampant. Union leadership and individual workers were struggling to figure out what was happening and how to engage. They blamed themselves for the state of the economy and unemployment. Seasoned unionists described themselves as "backward" and "ignorant," and felt ashamed of the economic losses people were suffering. They hoped to learn about the "free market economy" so that they could "modernize" and "conform better to corporate culture." Despite scarce employment and dismal wages, they wanted "to be better shareholders." In this context, the project coordinators were concerned that information about economic policy alone would only reinforce the myth that the economic policy results were they suffered "scientific" and "natural," rather than a question of power and interests.

The first step of the Education for Action project was to create a process where unionists could recover their rich political and economic understanding of the last ten years of their history. Many of the participants perceived the market economy as "an inevitable force of nature." Through the process, workers constructed an in-depth analysis comparing the dynamics between the state, the market and civil society over time against key historical events. Gaining confidence in their own knowledge, they later produced a detailed timeline of privatization laws against the backdrop of economic downturns they experienced – using their cell-phones to call colleagues and friends who might provide more accurate information for its construction. Within a short-time, unionists were working together in self-selected groups and individually to monitor, gather and weave together information about economic policy with what they knew about national and EU politics. They discovered that the EU and the US government had made the privatization of water and electricity a condition for EU accession and loans. Moving beyond a narrow understanding of their interest solely as workers, unionists explored alternative economic and political ideas and hopes through consultations with family and community.

As this project continues today, one of the many challenges facing the increasingly active unionists is their own union leadership and structures that may not accommodate the activist and questioning nature of the labor educators. Federation leadership are often invited by global and national policy actors in the Balkans to participate in policy "dialogues," creating the impression that their views are being heard. "Although we attempted to mitigate this inevitable resistance (to a more activist rank and file) at the top by carrying out short sessions with leadership and exploring the possibilities of linking the education to a larger federation campaign on water, electricity or another key economic issue," Lisa explained, "it was clear that there were much more complicated political obstacles blocking change."

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*The Solidarity Center is the internatilonal arm of The American Foundation of Labor - Confederation of Industrial Organizations (AFL-CIO).

Re-claiming the History of Popular Education

Popular education emerged in the 1950s and 60s based on the thinking and work of Brazilian educator, Paulo Freire.

Freire believed that poverty was rooted in unequal structures of power. He saw education to gain critical consciousness about the systemic roots of inequality as a prerequisite for transforming those inequitable relationships. Working with peasants, Freire found that socialization and cultural formation affected rural people's consciousness about their place in the world, preventing many from seeing themselves as citizens worthy of rights and capable of action. This realization led Freire to place great importance on helping people develop a critical awareness of their own power and potential and a deeper understanding of politics and change.

To confront this vision of power and powerlessness, Freire and his colleagues developed processes that helped marginalized people reflect on their lives in critical ways to strengthen their confidence, sense of solidarity, organization and skills of analysis and literacy. Problem-posing in nature, Freire's approach tapped activist and community knowledge about concrete problems and themes of injustice, developing related images in the form of drawings or photos to promote dialogue and awareness. These images, combined with key words, were the basis for generating reflection, literacy skills and critical thinking that, in turn, served as a foundation for building and strengthening community organizations and social change movements.

Freire's ideas and approaches were deepened, challenged and applied to a variety of contexts. Feminist academics (hooks 1993; Brady 1994) as well as practitioners, despite being inspired by his thinking, questioned his focus on class as the sole determinant of poverty and exclusion. Other analysts challenged some of his views on culture and consciousness. While they agreed that mechanisms of power shape how people see themselves, they believed that peasants' unwillingness to engage overtly in politics may be due to an implicit analysis of risk and power and not just to internalized attitudes of subordination. Instead of direct action, peasants may opt to resist oppression quietly through disengagement (see Gaventa 1980).

Still, the transformative potential of popular education has led it to be widely adopted and adapted in diverse contexts around the world.

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Adapted from Miller, Valerie, Lisa VeneKlasen and Cindy Clark. "Rights Based Approaches: Recovering Past Innovations" in Developing Rights, IDS Bulletin 36:1, January 2005.
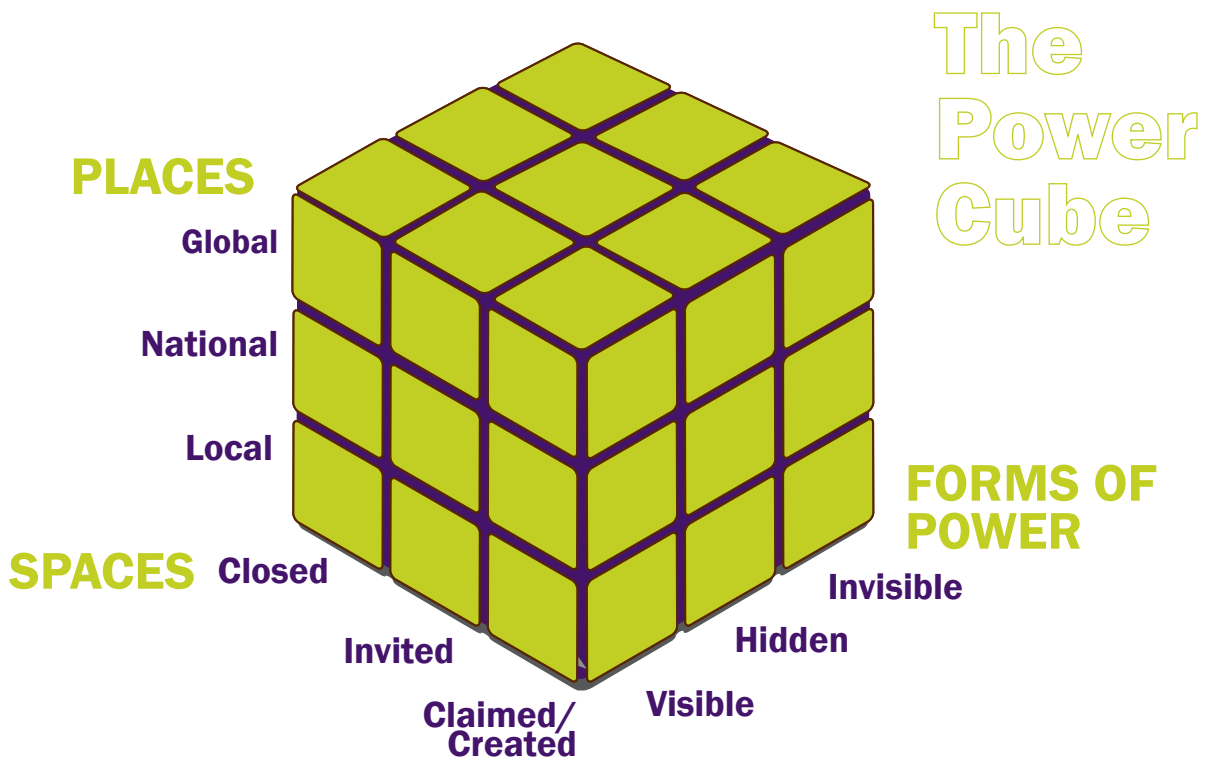
WRAPPING IT UP: THE POWER CUBE*

Power in Spaces and Places of Participation

The distinct threads of the workshop's conversations were pulled together using the "Power Cube" framework, developed by John Gaventa of the Institute of Development Studies. Aiming to represent a dynamic understanding of how power operates, the "Power Cube" presents some of the multiple ways that the voice, interest and leadership of disenfranchised groups are marginalized from participation in public decision-making and suggests the kinds of comprehensive strategies needed to negotiate their inclusion and begin to shift unequal power dynamics.

Faces of Power

Beginning with the right side of the cube, a conventional understanding of power assumes that contests over interests are visibly negotiated in public spaces and addressed equitably. Much of current advocacy and campaigning focuses on these **visible** faces and arenas of power such as polices, legislatures, government agencies, or court systems and emphasizes such strategies as lobbying, media, litigation and research and analysis. "But as our discussions have shown, power isn't just about 'winning' but also, keeping other issues off the agenda – the mobilization of bias." Moving beyond the uni-dimensional view of power, **hidden power** is exercised when certain actors or issues are explicitly excluded from the political agenda and public decision-making processes. Strategies to overcome these forces include combining community/union organizing, leadership development, movement building and participatory research – ways to build the organizational strength, legitimacy and voice of the poor and excluded. **Invisible power** is the internalized sense of powerlessness in the ways that were described in the case of the workers in Serbia—blaming themselves for unemployment —also in the case of small-scale sugar farmers in Kenya. It operates through belief systems and ideology. It is the most insidious because it not only works to control the agenda but also shapes people's consciousness and understanding of their roles, needs and ability to act. Strategies that strengthen people's

The Power Cube

PLACES
Global
National
Local

SPACES
Closed
Invited
Claimed/Created

FORMS OF POWER
Invisible
Hidden
Visible

confidence in their experience, sense of rights, solidarity and critical thinking help overcome the mechanisms of invisible power. To be successful in dealing with global economic power over the long-term, strategies focused solely on the visible arenas of decision-making need to be accompanied by strategies that also address hidden and invisible aspects of power.

Spaces

Power can also be analyzed in terms of the different spaces in which decision-making takes place. A **closed space** is one that is controlled by an elite group such as government officials and is not open to public participation. Civil society often works to challenge and open up these kinds of closed spaces to create **claimed spaces**. Civil society also creates **autonomous spaces** such as the World Social Forum. They provide groups with the chance to develop agendas, knowledge and solidarity without interference or control by corporate or government powerholders. With growing pressure from civil society over the last few decades, policymakers at many levels have created **invited spaces**. A select few from civil society are "invited" to participate in a policy process although the agenda and process remain in the control of the elites. While such spaces offer some possibilities for influence and may allow social justice groups possibilities for organizing, it is questionable whether these invited spaces actually create opportunities for any real long-term social change on critical issues. The danger is that they may even serve to legitimate the status quo and actually divert civil society energies from working on more fundamental policy-related problems. All these spaces are constantly shifting in terms of power and opportunity. Thus, civil society groups need to be strategic about when and how to engage (and disengage) in policy spaces and be realistic about what they can gain or lose from them. The case of the Kenyan sugar farmers brought these challenges to light.

Levels

All of these different forms of power and spaces of engagement play out across many different **levels**. The power cube looks at global, national and local levels but other levels are also relevant and can be added, depending on the context. For example, a feminist analysis would add the household, community and personal levels. Also, even though we may be working at the local level, we still confront elements of global dynamics. Thus, we have to look at all these levels together.

Understanding power this way challenges the false dichotomy between "evil global power holders" and "virtuous social movements." Unequal power relations are present in civil society and social movements as well. For example, women's concerns have often been marginalized in popular organizations and social movements. Struggles over resources and leadership between NGOs and community groups are also common and internal tensions around decision-making and democratic process are present throughout civil society organizations.

While this framework helps analyze different spaces, levels and relations of power, it is not intended to serve as a tool for designing concrete strategies. Instead, it is a valuable way to reflect on how the dynamics of power create different obstacles and entry points and require a comprehensive set of overlapping strategies to be effective. It can serve to help groups assess their actions in relation to the current types of power they are facing and thus help them better choose and combine different strategies in response.

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IMPLICATIONS FOR FUTURE ACTION

To conclude the meeting, participants shared a few final reflections and ideas on priorities for deepening and expanding citizen engagement in global economic policy processes to make them more accountable and response to people and the planet.

Within large institutions, like INGOs, educators and organizers **need moral support and solidarity** as they work to advance a more comprehensive people-centered approach for transforming global economic power. Rhetoric about participation and power is often quite good, but execution remains mechanical and contradictory. When people are isolated inside organizations, they cannot sustain the energy or clarity to bridge these divides and eventually leave. Women in male-dominated institutions face added burdens.

Participants recognized that a dire need exists for **a corps of more effective popular educators and trainers** to prepare the next generation of political educators and activists with the capacity to facilitate the kind of political analysis that links local to global dynamics and gives people a sense of their own power. Traditional training of trainer programs were criticized for their one-off nature and inability to ensure sufficient quality. The Participation Masters program at IDS is one space for training and learning that combines 10 weeks of on-campus study with 9 months field-based learning that allows people to return to their organizations to practice their skills, ending with a final 10 weeks of study and reflection. Identifying and supporting alternative learning and training spaces beyond IDS was considered key to expanding the numbers and quality of popular educators.

There was overwhelming agreement that **creative spaces for reflection and learning** among organizers, popular educators and advocates fundamental—to share experiences, analyze the *why*s and *wherefore*s of current work, test different approaches, recharge batteries, and develop some lessons and theory that can be applicable across countries in new contexts. This was seen as a way to reinvigorate and improve current practice as well as provide insights to train new people. However, preparing good popular educators is not easy since it involves a mix of skills, political vision, analysis and knowledge about the global economic system and more. Learning the skills of facilitation and analysis and acquiring the requisite knowledge are important but not enough. Other intangible personal sensitivities and qualities like humor, integrity, a passion for justice and contagious energy make some people effective and others less so.

To respond to the need for learning about the global economy and strengthening critical political analysis skills for effective strategies, participants proposed the creation of '**Global Economy Schools**.' Taking inspiration from the experience of the 'Citizenship Schools' that used voter education to raise consciousness and helped spark the civil rights movement in the US South in the 1950s and 60s, the concept is not a formal school. Rather it would be a political space for reflection and critical thinking tied to ongoing organizing. The idea would be to locate innovative learning efforts linked to economic justice initiatives in several different places to build bridges of information and solidarity between organizations and between communities.

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ADDITIONAL RESOURCES

Popular Education and Power Resources

Training for Transformation: Volumes 1-4
Anne Hope and Sally Timmel.
Available at: http://www.talcuk.org/catalog/product_info.
php?products_id=65

A New Weave of Power, People & Politics: The Action Guide for Advocacy and Citizen Participation
Lisa VeneKlasen with Valerie Miller, 2002.
Available at: http://www.styluspub.com/Books/BookDetail.
aspx?productID=138926

"What is Popular Education?"
Some Definitions from The Popular Education News.
Available at: http://www.popednews.org/pop%20ed%20def%20of%20
the%20month.htm

"Finding the Spaces for Change: A Power Analysis,' in Exploring Power for Change
John Gaventa, IDS Bulletin 37.6, Brighton: October 2006.
Available at: http://www.ids.ac.uk/ids/bookshop/index.html

Popular Economic Education Resources

Demystifying Economics: A Scoping of Economic Education Resources
Just Associates, 2004.
Available at: http://www.justassociates.org/publications_files/
ECONLIT_SCAN.pdf

Bridge: Building a Race and Immigration Dialogue in the Global Economy
Eunice Hyunhye Cho, Francisco Arguelles Paz y Puente, Miriam Ching Yoon Louie, and Sasha Khokha.
Available at: http://www.nnirr.org/

Economics Education: Building a Movement for Global Economic Justice
Mary Zerkel, ed. American Friends Service Committee.
Available at: http://www.rabble.ca/books/

Starting With Women's Lives: Changing Today's Economy
Suzanne Doerge, Beverly Burke, Women's Inter-Church Council of Canada, Canadian Labour Congress.
Available at: http://www.catalystcentre.ca/rtwx2/
Catalogue/0969143966.htm

Teaching for Change: Popular Education and the Labor Movement
Linda Delp, Miranda Outman-Kramer, Susan J. Schurman, Kent Wong, Center for Labor Research and Education at UCLA.
Available at: http://www.labor.ucla.edu/publications/

A Circle of Rights. Economic, Social and Cultural Rights Activism: A Training Resource
Blyberg A & Ravindran DJ (eds) 2000. New York: International Human Rights Internship Program/Asian Forum for Human Rights and Development. Available at: www.iie.org

Unpacking Globalization: A Popular Education Tool Kit
Economic Literacy Action Network.
Available at: http://www.highlandercenter.org/r-b-popular-ed.asp

A Very Popular Economic Education Sampler
Highlander Research and Education Center.
Available at: http://www.highlandercenter.org/r-b-popular-ed.asp

WEDGE: Women's Education in the Global Economy
Miriam Ching Louie with Linda Burnham.
Available at: http://www.coloredgirls.org/content.cfm?cat=publication
&file=wedge

Today's Globalization: A Toolkit for Popular Education in Your Community.
Project South, 2005.
Available at: www.projectsouth.org

IDS Working Paper Series on Civil Society Engagement on Trade

India and the Agreement on Agriculture: Civil Society and Citizens' Engagement
Shefali Sharma – forthcoming IDS working paper due out Autumn 2006. Email bookshop@ids.ac.uk to reserve a copy.

Civil Society Participation in Trade Policy-making in Latin America: Reflections and Lessons
Peter Newell and Diana Tussie – IDS Working Paper 267, 2006.
Available at: http://www.ntd.co.uk/idsbookshop/details.asp?id=925

Mapping Trade Policy: Understanding the Challenges of Civil Society Participation
Karen Brock and Rosemary McGee. IDS Working Paper 225, 2004.
Available at: http://www.ntd.co.uk/idsbookshop/details.asp?id=805

ActionAid Resources

Critical Stories of Change series
ActionAid International 2005.
Available at: http://www.actionaid.org/index.asp?page_id=1043

From services to rights: a review of ActionAid International's participatory practice
ActionAid International 2005.
Available at: http://www.actionaid.org/index.asp?page_id=1040

Critical Webs of Power and Change: A Resources Pack for Planning, Reflection and Learning in People-Centred advocacy
Jennifer Chapman & Antonella Mancini (eds).
ActionAid International, 2005.
Available at: http://www.actionaid.org/index.asp?page_id=1040

Reflect, rights and governance: Insights from Nigeria and South Africa
Kate Newman, ActionAid International & Pamoja, 2004.
Available at: http://217.206.205.24/enghome.html

Reflect website
http://www.reflect-action.org/

MAKING CHANGE HAPPEN 2

SPONSORS

Just Associates (JASS) is dedicated to building lively, inclusive democracy as both an end and a means to achieving justice, peace and human rights for all. As a global multidisciplinary network of experienced advocates, community organizers, popular educators and scholars in 12 countries, we work alongside local NGOs, trade unions, community groups and donors to strengthen the strategies that prioritize the voice and leadership of people and communities marginalized by gender, race, and class. Through innovative training, political education, organizational strengthening, action-research, popular education, and long-term strategic "accompaniment", we seek to improve people's collective capacity to change attitudes, laws and institutions toward the creation of a just, equitable and sustainable "common good." JASS works through three cross-cutting strategic initiatives: Economic Rights and Citizen Action; Women's Rights and Political Empowerment; Local to Global Bridges for Learning & Action.

www.justassociates.org

Participation, Power and Social Change Team, Institute of Development studies, UK

The Participation, Power and Social Change Team is a diverse team of researchers and practitioners who work with a wide network of partners around the world to advance concepts and practices of social inclusion, citizenship, participatory governance and basic human rights. Our primary aim is to better understand, critique and advance participatory innovations and methods that place the voices and concerns of marginalised people at the centre of decision-making. Our programmes and partnerships are mostly longer-term initiatives for mutual learning and knowledge creation, framed around a common set of strategic themes. Currently these themes revolve around the challenges of strengthening citizenship and rights, approaches to participation in governance and policy processes, and methods for facilitating learning with both individuals and institutions. These themes are pursued through complementary activities that bridge conceptual and theoretical research with practical case studies, methods, and policy needs. Activities include research, advisory work, thematic workshops, teaching and learning activities, networking, resource sharing and communication. The Participation, Power and Social Change Team is one of six thematic research teams at the Institute of Development Studies, University of Sussex, in the UK.

www.ids.ac.uk/ids/particip

Knowledge Initiative: ActionAid International (AAI)

The Knowledge Initiative (KI) is a space ActionAid International has created to both strengthen and challenge its own and other's efforts to build human rights and social justice principles into its work, and rapidly innovate in areas in which there are important knowledge-related gaps. KI is particularly interested in the interface of local community knowledge with outside knowledge, and the critical and creative role of staff in mediating this interface, whether through experiential learning, innovative research, knowledge generation partnerships, or through the application of popular education and participatory approaches. The Knowledge Initiative works within ActionAid International (AAI), an international development agency whose aim is to fight poverty worldwide. Formed in 1972, for over 30 years AAI has been growing and expanding, and now helps over 13 million of the world's poorest and most disadvantaged people in 42 countries worldwide. In all of our country programmes we work with local partners to make the most of their knowledge and experience. We work with local partners to fight poverty and injustice worldwide, reaching the poorest and most vulnerable people, and helping them fight for and gain their rights to food, shelter, work, education, and healthcare, and a voice in the decisions that affect their lives. Our partners range from small community support groups to national alliances and international networks seeking education for all, trade justice and action against HIV/AIDS. Our work with these national and international campaign networks highlights the issues that affect poor people and influences the way governments and international institutions think.

www.actionaid.org/1188/knowledge_initiative.html

http://www.actionaid.org/