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## Capabilities and Education in Latin America

## Capacidades y educación en Latinoamérica

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### **Abstract**

This paper explores the fundamental theses of the capabilities approach and differentiates it from notions of development that are more focused on the generation of wealth and growth. The paper emphasizes the importance of action in the development of life projects and describes the importance of emancipation in exercising freedoms. It then describes the education challenges from the perspective of the capabilities approach. It situates the importance of this approach in the Latin American context, where freedom is closely linked to the pursuit of social justice. Finally, it describes the different areas of application of the capabilities approach in education and points out the limitations of formal education in the contemporary world.

*Keywords:* capabilities approach; education; emancipation; action; Latin America.

### **Resumen**

Este artículo explora las tesis fundamentales del enfoque de las capacidades y lo diferencia de las nociones de desarrollo más centradas en la generación de riqueza y crecimiento. El artículo destaca la importancia de la acción en el desarrollo de proyectos de vida y describe la importancia de la emancipación en el ejercicio de las libertades. A continuación, describe los retos de la educación desde la perspectiva del enfoque de las capacidades. Sitúa la importancia de este enfoque en el contexto latinoamericano, donde la libertad está estrechamente vinculada a la búsqueda de la justicia social. Por último, describe los diferentes ámbitos de aplicación del enfoque de las capacidades en la educación y señala las limitaciones de la educación formal en el mundo contemporáneo.

*Palabras clave:* enfoque de las capacidades; educación; emancipación; acción; América Latina.

## 1. Introduction<sup>1</sup>

The starting point of this paper is to recognize that the *capabilities debate* has acquired a distinctive meaning in Latin America. Aside from the importance of Sen and Nussbaum's proposal, according to which development should be understood as the possibility that societies offer their citizens to live the life they consider valuable, in Latin America, the discussion about capabilities intersects with post-developmental debates, decolonial views, the critique of the very concept of development, and the political relevance of social movements.

In that sense, the capabilities debate offers a fertile scenario in which people-centered considerations are essential to growth and development.<sup>2</sup> "Fostering participation and organizing grassroots movements of citizens that claim a further involvement in policymaking, is no longer perceived as a subversive practice, but the best ally of strengthened democracy, in the promotion of good governance" (Carballo, 2016, p. 13).

It is well known that the capabilities approach has challenged economic-based notions worldwide. Its ethical and political considerations and its focus on promoting people enjoying meaningful lives have impacted Latin American debates about transformative and emancipatory practices (Carballo, 2015, pp. 4-5), especially since the mid-eighties. With the relevance of international cooperation agencies and UN agendas, the reliance on individual and collective agency became the mainstream development concept in public policies, national governmental institutions, and political strategies (Carballo, 2015, p. 11). At the same time, the emergence of new paradigms based on traditional Andean-wisdom (*Sumak-Kawsay*) and the fierce critique towards Western thought developed formulated by relevant thinkers, such as Arturo Escobar, merged with the capabilities approach in new

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<sup>2</sup> In this first part, we will follow some of Carballo's (2016) historical and conceptual descriptions of how robust the capabilities approach in Latin America has been (2016).

interpretative frameworks, characterized by the contrasting realities of Latin American Countries.

In Latin America, a historical combination of impoverished economic conditions, limited access to political participation, and multidimensional violence have created a challenging context for policy institutions. Somehow, Latin American history has been marked by continuous and incomplete efforts to alleviate social problems.<sup>3</sup> Political ideas which advocate for dignity and respect in Latin America have been accompanied by institutional efforts to guarantee material opportunities and livelihoods for people. Social struggles have been critical here, mainly because, through them, it has been possible to make visible some demands about the significance of individual and community involvement in the development processes.

Notions of social progress, social justice, and economic opportunities have been present in Latin America since the 60s and 70s, and have continued (Carballo, 2016, pp. 10-12). Indeed, it is common to find “empowerment,” “participation,” “income distribution,” “inequality,” “injustice,” “opportunities,” “capabilities,” etc., as part of the vocabulary related to sustainable development, alternatives to development, and the construction of better futures based on reconsidered action and thought models.

In Latin America, the capabilities approach has had a nuanced reception. On the one hand, the capabilities approach has been open to Latin American traditions of thought. Indeed:

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<sup>3</sup> “In 1979, Monseñor Oscar Romero wrote from San Salvador his fourth and last pastoral letter exhorting the church to continue its struggle to become the Voice of the Voiceless, ‘a defender of the rights of the poor, a promoter of every just aspiration for liberation, a guide, an empowered, a humanizer of every legitimate struggle to achieve a more just society.’ At that moment, Monseñor Romero was the archbishop of San Salvador, the capital city of El Salvador, and a supporter of the Liberation Theology movement that emerged from the Medellín meeting of the Latin American Bishops Conference in 1968. In linking churchwork with an active claim for improvement of the peoples of Latin America’s living conditions, Liberation Theology began involvement with national politics, which led to ground-breaking discussions in the promotion of development centered on grassroots work and the empowerment of the poor. Their understanding was that development should be seen as ‘liberation,’ a liberation that was not only spiritual but had its fundamental material roots in the transformation of the living conditions of the poor” (Carballo, 2016, p. 11).

[...] ideas of development took shape in academia after the Second World War. It was that apocalyptic scenario of devastation in different regions of the world following the war and the Great Depression that gave rise to the first series of systematic analyses of the conditions and strategies to allow for the recovery of some nations and the ‘take-off’ of newly independent ones (Carballo, 2016, p. 15).

Latin American economic and political circumstances were perfectly suitable for a growing interest in such an approach. Talking about a general promotion of human lives instead of assuring more privileges to the privileged was something Latin Americans had been waiting for since the 60s and 70s—and its price was high in terms of lives taken in the middle of social, political, and armed conflicts (Colón-Emeric, 2018; Quijano, 2000). In that sense, insisting on people regarding their difficulties and needs in Latin America were welcome ideas and debates of giving voice to the voiceless and conceptions centered on expanding freedoms and improving individual and communitarian working opportunities, studying, accessing health systems, etc.<sup>4</sup>

On the other hand, well-known ideas of modernization and development were highly controversial in Latin America. Today, we recognize that the allegations that Latin American countries were culturally, politically, and economically backward, and needed enlightenment through industrialization and financial investments, were actually driven by the economic interests of foreign states solely focused on their own business growth. We have a better picture these days of how aggressive development programs have become ways of consumption, ingestion of natural resources, and impoverishment of

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<sup>4</sup> Ideas of human development and the capabilities approach have not been excluded from controversies. Defenders of those ideas in Latin America have advocated for the progress and betterment that said ideas usually represent. In contrast, adversaries prioritize human development, and claim that the capabilities approach constantly renovates instruments of domination by the Western governments over peoples of different cultures. In the middle, some try to keep the best contributions of the human development and capabilities approach while, at the same time, making amendments to strategies, goals, and institutional means for their implementation (Carballo, 2016, p. 33-35).

human lives at different levels—i.e., multidimensional poverty, violence, lack of opportunities, political exclusion, etc.<sup>5</sup>

Life expectancy, health standards, inequality, water and sanitation, shelter, personal safety, access to education, job opportunities, environmental quality, violence, and poverty have traditionally been issues that raise strong doubts and criticism. In Latin America, the apparent wonder of modernity and development has been a notorious source of suspicion. Critical judgments about the exploitation of national natural resources by foreign countries in need to sustain their production systems are well known, as well as unequal structural economic interchanges related to peripheral dependency at the level of industrial production, importation/exportation capabilities, workers' status, etc. Besides, intellectuals have traditionally denounced cultural struggles between strange ethical frameworks in which existing standardized modes have permeated Latin American countries (Carballo, 2016, pp. 40-42).

At the same time, criticism of Western-conditioned conceptions of development and modernity has assisted contemporary debates regarding how to ensure human growth. It is easy to understand why summoning deliberation about substantive freedoms and support for human actions has been recently attractive in Latin America. Calls for careful attention to people's needs and options have nurtured sociopolitical prospects of finding alternatives to traditional public policies—usually known for their injustice, violence, and prejudices about economic status, intellectual inheritances, family preceding, and conservative values (Carballo, 2016, pp. 38-40).

Finally, calls for transformative political actions guided by real interests in supporting differentiated ways of living have transformed conceptually historical attempts to gain social changes since the "Revolution or Reformism" decades (Chaparro, 2019, pp. 33-60). Despair and hopelessness due to a lack of improvement and difficult living

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<sup>5</sup> *Civilized to Death: The Price of Progress* (Ryan, 2019) has reassessed the price of civilization and development, traditionally understood under the slogans of modernization and economic devotions. Ryan has made clear the outcomes of those ideas are, at least, questionable.

conditions in Latin America have supported the criticism of progress.<sup>6</sup> Those who despair have also held an interest in new options.

Based on the above, it is possible to identify the most relevant feature of the capabilities approach in the context of the Latin American debates on development. This feature is its permanent insistence on actions, actual conditions of action, and widening possibilities of any possible action—not just in humans, but also in other beings (Nussbaum, 2011, pp. 143-185). Conceptually, that is a considerable step representing hopes for finding new ways of thinking about supporting people as crucial social, economic, and political players. Pragmatically, emphasizing the important role of collective and individual actions promotes alternative people-centered policies at the state level, such as current development institutional practices, i.e., current development institutional practices (Carballo, 2016, pp. 103-109).

With this in mind, we will review recent Latin American conceptual debates about the notions of action and emancipation and the discussion about education's role in pursuing human development. We want to say here that education is about acting in problematic situations where we change by what is happening, being also true that what is happening is altered by our situated actions. In such a way, education can be understood as triggering capabilities contextualized by concrete realities. The central idea is to show, then, that education is pragmatic.

In her book *Cultivating Humanities*, Nussbaum (1997) recognizes the role of education in shaping the democratic capacities of citizens. Although this idea has been well received and supported by academics, current education does not seem to fulfill this purpose. For example, Searle (1993), Mortenson (2000), and Olssen & Peters (2005) examine the crisis of education and show how education in the United States is yet to be able to include the underprivileged. Sandel's (2020) reading of this

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<sup>6</sup> “Increasingly, the disappointment with the results of democracy and development were leading people in the region to believe that it was an either/or situation: either liberation and social justice or capitalism and liberal democracy. The disillusionment with the state, the dichotomized readings of the world fueled by the Cold War, combined with a belief in human solidarity and a renovated sense of the strength of the political mobilizations of youth and people from all over the world, accompanied the emergence of some of the first theorizations of individual agency in consideration of development” (Carballo, 2016, p. 46).

unfulfilled promise is that education responds to market principles and serves as an instrument of capitalism. He presents current education as a mechanism that benefits those with higher incomes and privileged educational experiences. In doing so, he highlights how current education is not only not meritocratic but also encourages competitive systems in which the development of capabilities is not possible.

In that context, it is possible to recognize that this paper has an ambitious purpose as it seeks to examine some features of Latin American education in the light of certain central elements of the capabilities approach and, through this, to critique current models. It is not in our interest to make an exhaustive presentation of the theoretical aspects and foundations of the capabilities approach nor to exhaust the critical discussion on the role of education in the construction of democracies. But we do want to show that by focusing on essential elements such as action and emancipation within the framework of capabilities, it is possible to identify some educational shortcomings that need to be addressed.

## 2. Action and development

From Spinoza to Nussbaum, from Nietzsche to Deleuze, it has been said that people's capacities have as many limits as possibilities of action, feeling, and thought they can enjoy (Esposito, 2006, pp. 108-117). People are not images or displays—they are not simple identities having a place as *simulacra* on screens. People are not representations of what they believe is true. People are not what they think can be adequate to portray subjective determination, i.e., self-assertions, personal beliefs, etc. People are, on the contrary, what they really can do. What people can do is precisely what they are. "It is then right to say that what we do depends on what we are. But it is necessary to add also that we are, to a certain extent, what we do, and that we are creating ourselves continually" (Bergson, 1911, p. 22). To create oneself requires freedom if human capabilities are to be deployed. Therefore, freedoms are essential (Sen, 2000, p. 10; 2001, p. 36). The concept of agency refers to the capacity of an individual to make independent choices and take actions that have an impact on their own lives. "Each person is a dignified and responsible human being who shapes her or his own life in the light of goals that matter, rather than simply being shaped or instructed how to think" (Walker & Unterhalter, 2007, p. 5).



Undoubtedly, agency represents a remarkable concept because it refers to freedoms (in plural) and holds materialistic and pragmatic connotations. “Freedoms” means we can do various and creative things—i.e., “freedoms are diverse” (Sen, 2000, p. 30). We can discover how to embody ethical commitments and joyful enterprises (Deleuze, 1988). Actions also involve contingent environmental circumstances, social facilities, and other people, enabling social networks and social safety nets (Latour, 2005, pp. 21-87; Sen, 2000, pp. 35 & 282-285). In general, actions implicate opportunities, resources, and other beings: from personal agency to concrete collective assemblages triggering, supporting, and enabling activities within contextualized processes.<sup>7</sup> That means there are connections between material conditions, people, and actions usually expressed in forms of relations between “income and achievements, between commodities and capabilities, between our economic wealth and our ability to live as we would like” (Sen, 2000, p. 13).

Living long and living well are strongly valued possibilities at an individual level. However, living long and well is collectively promoted through economic security conditions, social opportunities, and political freedom, human topics that are mutually redundant.<sup>8</sup> In summary, freedoms are reflected by real people being able to do various things in concrete conditions. “Capability set” and “functionings”: people can do different things, and people have real opportunities for achieving doings

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<sup>7</sup> The opposite is also true: “unfreedom can arise either through inadequate processes (such as the violation of voting privileges or other political or civil rights) or through inadequate opportunities that some people have for achieving what they minimally would like to achieve (including the absence of such elementary opportunities as the capability to escape premature mortality or preventable morbidity or involuntary starvation)” (Sen, 2000, p. 16).

<sup>8</sup> “Individual freedom is quintessentially a social product, and there is a two-way relation between (1) social arrangements to expand individual freedoms and (2) the use of individual freedoms not only to improve the respective lives but also to make the social arrangements more appropriate and effective. Also, individual conceptions of justice and propriety, which influence the specific uses that individuals make for their freedoms, depend on social associations—particularly on the interactive formation of public perceptions and on collaborative comprehension of problems and remedies” (Sen, 2000, p. 30). Sen (2000, pp. 40-43) has provided detailed explanations of the phenomena of redundant positive outcomes among freedoms.

(Sen, 2000, p. 74). Combinations of functionings and the capability set make freedoms real (Sen, 2000, p. 75).

Former considerations lead up to specific questions. How well are people doing? Do people have concrete material and social contexts for doing what they believe is adequate and worthy of their lives? (Nussbaum, 2000, pp. 6-10). Active doing and being active: in the most important debates about economic growth, modernization, and development, it is possible to find questions about the nature of action and its conditions (Nussbaum, 2000, p. 14). Breaking profoundly with linear notions of progress and economic concepts of development is necessary to focus on agency aspects of people's social lives and their nonlinear social becomings within complex action networks. Focusing on what people can do and enjoy as part of diverse entities and multiplicities guarantees alternative considerations to the meaning of progress and development. Let us introduce some crucial details about that idea.

Western thought was traditionally captivated by developing clarifications about what it means to be an individual. Identity, unity, self-consciousness, essence, etc., have been our central and traditional ideas. Unconventional considerations about what it means to be an individual have come from different approaches to actions, activities, performances, abilities, and skills: think of *Spinoza* (Deleuze, 1988), *Nietzsche* (Deleuze, 2002), *Tarde* (1969), and *Deleuze & Guattari* (2005). Those who are busy interrogating beings about what they can do usually go forward with clarifications about attributes, properties, and characteristics to be grasped by expressions of singular entities' actions. Thinking about agency to act has become common these days.<sup>9</sup> But there are essential changes in familiar viewpoints to keep in mind to understand how hard and significant it has been to take that step.

"The adult who lacks the means of having medical treatment for an ailment from which they suffer is not only prey to preventable morbidity,

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<sup>9</sup> We are working on the "agency" notion in Sen's way – meaning in the sense of "someone who acts and brings about change, and whose achievements can be judged in terms of her own values and objectives, whether or not we assess them in terms of some external criteria as well" (Sen, 2000, p. 18). Sen is mainly "concerned with the agency role of the individual as a member of the public and as a participant in economic, social and political actions (varying from taking part in the market to being involved, directly or indirectly, in individual or joint activities in political and other spheres)" (Sen, 2000, p. 18).

and possibly escapable mortality but may also be denied the freedom to do various things—for herself and others—that she may wish to do as a responsible human being” (Sen, 2000, p. 284). That is precisely what Marvel Moreno, a Colombian writer, depicts—in *El tiempo de las Amazonas*—when talking about one of her characters, Gabriela:

Gaby had to sleep ascetically and soundlessly until her death. Her illness pushed her to chastity, where he wanted to confine her. But, if all that can be considered a comedy, her pains could be understood as a redemption form. Sick, she was preserved from desiring men, and she was once again that untroubled Gaby that he had loved without really ambitioning her. No one, no doctor, should intervene to help her overcome a prostration in which she acquired the majestic and solemn air of a goddess afflicted by death’s proximity. Silent and miserable, she had finally regained her dignity (Moreno, 2020, p. 55; our translation).

All beings are what they can do (Latour, 2005, pp. 8-10). There are no substances or essences at the bottom of what we are. What we do is what we are. Violence and sadness refer to everything keeping away our possibilities of motion, adventure, vivacity, desire, battle. Maintaining an open state of mind and perception about that consideration is always crucial. Agency, movement, and dynamics are attributes of everything living. We mention Marvel Moreno because she was able to extensively capture, through literature, what it means to live under disabling environmental conditions and fight against them.

Emphases on actions instead of substances prompt exciting questions. When we act, are we doing it because of motives, reasons, and desires? Do we act because we want to do it? Or is there anything more at stake? How come we never do what we want without being supported by other beings and assisted by actual conditions? “Actions are not transparent” (Latour, 2005, p. 44): human actions are not done under the absolute control of consciousness and are not clearly explained by the act’s willingness. There are, of course, reasons for acting. People commonly express motives, purposes, aims, and ambitions grounded in vivid conceptions of what is essential—i.e., values. But acting also concerns realities: conditions on which everything we want to do is supported. What makes all of us do things? Actions are not transparent.

Self-observation is insufficient, not because obscure reasons exist behind what we do, but because there is a continuity between voluntary actions and concomitant enabling conditions. Inherent in our social enigma is that we only sometimes have the conditions to discover and develop what we can. Just wanting things to happen is unsatisfactory. Even if it turns out that actual humans are entirely selfish, social networks' reality defies such a presumption. No one can live by herself and discount other beings without falling into foolish viewpoints (Sen, 1977). Each human action is grounded on concrete circumstances and depends on others to an enormous extent.<sup>10</sup>

Requiring support is an expression of uncertainty: reliance on others represents fragility because it suggests subordination, tutelage, habituation, and necessity. That is not the case, for sure. When they are placed outside mere human volition and self-determination, possibilities of action address questions about how to nourish and sustain networks that are resources to make all action possibilities longer. We are not alone in this world. Apparent uncertainties of being fragile because of mutual dependence can be translated into intense collective endeavors focused on creating capabilities as requisites for living and acting in different ways. Capacitation, expansion, and stimulation are what comes with networking involvement. If we recognize that living is all about increasing capabilities and playing around with capable beings sharing our lives, we will finally find collaborative strengths instead of individual weaknesses.

Actions are borrowed, distributed, suggested, influenced, dominated, betrayed, and supported by other activities. That is a assertion about whether it is possible to assume research projects by which descriptions of different performances at multiple levels of existing can be done,

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<sup>10</sup> "In a series of articles published during the 1880s, Tarde also laid the bases of his distinctive sociology, which would soon come to collide with that of a younger, up-and-coming sociologist: Émile Durkheim. In an article entitled 'Qu'est-ce qu'une société?', Tarde first posited his definition of society as imitation, which would later form the core argument of his most famous book, *Les Lois de l'imitation*. In a careful reconsideration of Tarde and Durkheim's later battle over the definition of imitation, Bruno Karseni argues that at the heart of the Tardean account of imitation was a head-on engagement with the central paradox of social action: the indissociability of acting and being acted upon" (Candea, 2010, p. 3).

i.e., comparisons of life quality (Nussbaum, 2000, p. 6). Actions can be understood as constituting processes in which means to achieve ends, conditions for achieving them, and reciprocity between means and ends intervene. Within complex systems, actions are events related to other actions happening in nonstationary states of becoming.

Capabilities are ways of relating to the environment that, for its part, enables functionings of capabilities. Within the capabilities approach, it has been emphasized how interlinked all actions are. It has been additionally stressed that action defines all beings interacting in specific contexts. This is in striking coincidence with theoretical sociological trends traditionally dedicated to understanding societies as networks and actions as fundamental elements of every social interaction.<sup>11</sup> The main idea is relatively simple: individuals can act within constitutive networks where events occur as activities mutually connected under concrete enabling conditions. It can be said that moral and political inquiries associated with the capabilities approach are related to current sociological descriptions at the precise crossing point between three specific questions: firstly, what are the powers of all beings —what can they do? Secondly, what is at stake when individuals put their capabilities into motion? Finally, what counts as enabling conditions to guarantee individuals will enjoy real possibilities of action?

The whole thing is about a simple idea: paying attention to what people can do represents ways of celebrating people's tenacity and feistiness and their strong willingness for independence and self-sufficiency. Living in search of competence and mastery and control over living conditions brings about what we have called "freedom" many times. Sugar and milk: Material differences ensure you will have sweet tea and sweet tea and milk in some countries.<sup>12</sup> Those material

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<sup>11</sup> "For the theory of creativity of action, the significance of the situation is far greater: action is not only *contingent* on the structure of the situation, but the situation is *constitutive* of action. This means that the situation is not simply a neutral field that actors enter with preset goals; instead, the situation itself exercises a regulative role for our responses in a specific action context. The ability to act presupposes that the actor judges the kind of situation he or she is in; thus, a judgment of the situation entails a judgment about the appropriateness of possible responses" (Joas & Beckert, 2001, pp. 273-274).

<sup>12</sup> "The very idea that crucial choices would be made [...] about who gets to have milk in tea and who only sugar, is a fact that feminist philosophers may find more difficult to comprehend than the big facts of location and political

differences concern quotidian privileges and advantages that make vital distinctions in how people live. Imagine how necessary are, then, other rights such as having an education, getting loans, buying food, owning a house, having companions, etc. All we need are opportunities to discover options. How to have a family? How to work? How to love? How to make a living? How to enjoy time? There are day-to-day activities worthy of being widely considered substantive freedoms (Cleary, 2020). Experiential questions about performative alternatives in open societies are, for instance, how to be at parties, have fun, or enjoy intimate conversations.<sup>13</sup> There are compelling examples of what that means and the prices people have paid for it: *Persepolis* (Satrapi, 2003), *Embroideries* (Satrapi, 2005), or *An American Bride in Kabul* (Chesler, 2013).

### 3. Emancipation

In contexts of discontent, education has traditionally represented hope. Since the 1960s, it can be said that there have been strong convictions that things must change, and observers of history usually agree on how vital students (a “peasantry”) have been in such desires (Reid, 2007, pp. 212-233). There has been a meaningful discussion about how crucial education is regarding social change. There have been intense debates around Latin America, including ideas about changing social patterns, fighting political constraints, and opposing economic inequalities. In that context, education and social change have been connected by theoretical assertions about how public contestation can bring novelties and how educational processes have transformative outcomes (Anyon, 2011, pp. 2-6). Education tends to reveal fundamental

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organization and religion. (Most American philosophers probably are not aware—I certainly was not—that the amount of sugar that goes into tea costs less than the amount of milk that goes into tea—I would not begin to count pennies to the extent that is common in poor households the world over)” (Nussbaum, 2000, p. 22).

<sup>13</sup> This is about the expansion of capabilities (Sen, 2000, pp. 17-18). As Sen says: “Having greater freedom to do the things one has reason to value is (1) significant in itself for the person’s overall freedom, and (2) important in fostering the person’s opportunity to have valuable outcomes. Both are relevant to the evaluation of freedom of the society members and thus crucial to assessing society’s development. [...]. Greater freedom enhances people’s ability to help themselves and influence the world, and these matters are central to the development process” (Sen, 2000, p. 18).

dilemmas concerning human development and social change regarding social opportunities and extended political rights.

On the other hand, in Latin America, it has been said that people need education for emancipation. It is simple to fail to remember an idea's importance when repeated too often. Thinking about education and social justice expresses careful attention to hard questions about how to enrich human lives—an endless task concerning harsh working conditions, poverty of the people employed, lack of adequate educational infrastructures, old-fashioned learning programs, etc. Indeed, emancipation from economic oppression and human development by education has been a *leitmotif* in Latin America.<sup>14</sup>

“Emancipation” usually reminds us of an old idea in Latin America: possible liberation “from all inequality, injustice, despotism, and obscurantism” (Quijano, 1989, p. 153). Emancipation and education have been coupled following a singular idea: education gives people chances to develop particular conceptions worth putting into practice regardless of external pressure, i.e., authority. Education is about the freedom to participate in social life given certain material conditions for having real options for making concrete individual values and beliefs. People work, buy, consume, travel, and talk in the context of economic interchanges. But there are more options, even considering realistic views about financial circumstances.

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<sup>14</sup> “Challenges to the State-centric view of the development process did not come from established academic or policy practitioners. In Latin America, the questioning of alternative development paths came from the priests and theologians active in *Liberation Theology* and secular social activists and educators in *Critical Pedagogy*. [...] According to the Latin American Episcopal Conference (CELAM), the role of the Church was very different than traditionally assumed; it identified the mission of the Church with the fight against poverty and underdevelopment, a fight against the structures of injustice and oppression, a fight against capitalism and imperialism, that would reject the traditional hierarchies and opulence that the Catholic Church had been displaying for centuries [...]. The ‘preferential option for the poor’ that some sections of the Latin American Catholic Church embarked upon was built together with the poor people of the local communities to coordinate political responses to their urgent needs: organizing political mobilization, protests, solidarity campaigns, and more concretely oriented projects related to health and education” (Carballo, 2016, p. 46).



Education expresses how significant material opportunities are for people's living conditions and the discovery opportunities of new scenarios of life and other behaviors. What the notion of emancipation reveals (in a non-restricted sense related to the idea of class antagonism and social struggles) is that human capabilities are decided by material conditions: extending those conditions means expanding possibilities of action taking place in educational scenarios. Education and emancipation are elements of the idea that people can transcend their social situation by exploring their powers of action if adequate material conditions are given.

We all demand conditions for doing whatever we think is valuable and enjoying diverse lives. Social and political struggles seem to materialize such demands because social arrangements can trigger actions—or impede them.<sup>15</sup> In Latin America, traditional conservative ideas of centralized governments have been understood as obstacles to diverse functionings and capabilities (Quijano, 2000). In contrast, emancipation is understood as realizing how to be free to explore possibilities of living without authoritative constraints and economic hindrances. People do not need others to command their lives. No police, politicians, teachers, religious representatives are necessary as people leaders. Instead, taking part in social life means having material options for freely doing what it can be—personally and collectively—considered necessary. Of course, there are diverse standards of living. Even competitive living standards exist (Sen, 2001, pp. 1-19). Moreover, it can be said that it is necessary to reflect on them to achieve reasoned, inclusive models of action. However, more than accepting diversity and minimum living models, it is fundamental to guarantee that people have real possibilities to decide what kind of life is worth living among different options and make those options a reality. In this valuative and pragmatic human task, education has a real place.

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<sup>15</sup> “For example, a learner might value the capability for voice but finds herself silenced in a classroom through a particular social arrangement of power and privilege. To convert her capability into functioning, she needs social arrangements sensitive to her ways of expressing herself and giving her opportunities for this. This requires particular forms of classroom pedagogy and management and the resources for this that are not only fixed assets such as staff, but also training, cultures or concern with learner's difference, and the capacity to put this care into practice” (Walker & Unterhalter, 2007, p. 10).



#### 4. Education and emancipation

Education as a human development scenario has been strongly present in the capabilities approach, reinforcing current Latin American insistences on the significance of individual and collective agency.<sup>16</sup> Coincidences between human development and education have been captivating, primarily because of the idea that individuals and communities are what matters and that education becomes what human beings need to improve their perception, interpretations, and engagements with reality's transformations. Since the work of Shultz in 1963, it has been remarked that investing in the development of human cognitive capacities and skills has payoffs both for them and for their societies (Chabbott & Ramirez, 2000, pp. 164-165). In believing that human development can be institutionally assumed, it becomes noticeable that education is understood as one of the most fundamental ways of making betterments on people's possibilities of agency: by processes of discovering, helping, and enhancing human capabilities, what people can do becomes central (Terzi, 2007).

We turn now to unfolding that presumption. Expansion of freedoms comes from economic opportunities, political rights, social facilities, transparency guarantees, and protective security—i.e., material arrangements that need to be assessed regarding freedoms that people can effectively enjoy (Sen, 2000, pp. 12-18; 52-53). Social innovation is expected to be born from education because it affects day-to-day behaviors by radically embracing action opportunities in transformative ways. That consideration has been the underlying assumption made by scholars since the education and development studies performed around the 1960s onwards. It is well-known that future generations can imitate social patterns of behavior and cultural stagnation is fueled by a lack of educational interests (Farkas, 2018).

In contrast, active change agents can cut up imitative patterns by overcoming traditions and discovering various action initiatives in

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<sup>16</sup> "Education as the practice of freedom—as opposed to the practice of domination—denies that man is abstract, isolated, independent, and unattached to the world; it also denies that the world exists as a reality apart from people. Authentic reflection considers neither abstract man nor the world without people, but in their relations with the world" (Freire, 1972, p. 62).

interconnected political and economic contexts (Chabbot & Ramirez, 2000, pp. 168-169). But how much would education help people get what they want? How important is education in accomplishing betterments in organizational and political designs, and economic processes? How far would education go when it comes to helping societies change? Those are difficult questions because they express tricky predicaments between individual human expectations about the future and their material limitations.

It has been said that education belongs to a freedom-centered perspective in which it is essential to understand it as an instrument of social change for the future. That means education is about enriching substantive freedoms by constituting scenarios for expanding possibilities of action.<sup>17</sup> Education is about building behavioral alternatives: “To be actively involved in shaping one’s own life and having opportunities to reflect on this is critical for positive social change [...]. Like learning, thinking of oneself as an agent whose actions and contributions count in the world of education does not happen overnight. It is a process of both being and becoming” (Walker & Unterhalter, 2007, p. 6).

We insist that human development and education are related based on a simple idea in the context of the capabilities approach. If it is true that people must be actively involved in shaping their destiny, then they require material scenarios of strengthening. Education is supposed to provide the means to discover what people can do. It is believed that education supplies qualified reasons for doing what people can, meaning it is concerned with people’s decision-making processes. It is said that education focuses on freedom.

Nevertheless, it is essential to consider how vigorous some debates have been about deciding if education contributes to reaching social justice or if it is just a machine for social stratification (Farkas, 2018). It needs to be made clear if the more qualified people are necessarily more productive. Besides, it is still being determined if education

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<sup>17</sup> “The pioneering example of enhancing economic growth through social opportunity, especially in basic education, is, of course, Japan. It is sometimes forgotten that Japan had a higher literacy rate than Europe had, even at the time of the Meiji restoration in the mid-nineteenth century when industrialization had not yet occurred there but had gone on for many decades in Europe. Japan’s economic development was much helped by the human resource development related to the social opportunities that were generated” (Sen, 2000, p. 40).

secures advantages in the middle of hierarchical orders and social elites. It seems education can play a role in more open societies by taking part in the process of expanding freedoms—it being the case, at the same time, that education can add more intense social layers and contribute to competition and conflict between classes, ethnic and religious groups, and between women and men (Chabbott & Ramirez, 2000; Downey, Yoon & Martin, 2018).

That means contemporary viewpoints about the quest to find what people can do must be complemented by views about what is necessary for enjoying real options of acting as people like, i.e., “opportunities to achieve valued outcomes” (Sen, 2000, p. 290). Education is about making a living, but not merely about having qualified training to fulfil social and economic demands. Making a living by education concerns finding what people need to satisfy their living ends.<sup>18</sup> That means education must pay attention to actual demands without being confined only to income generation and high consumption. It is the case that “through education, learning, and skill formation, people can become much more productive over time, and this contributes greatly to the process of economic expansion” (Sen, 2000, p. 292), but it is also true that education needs to be understood under possibilities of non-current human behaviors if it will adequately take on the idea of expanding human freedoms.<sup>19</sup> That means “the benefits of education exceed its role as human capital

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<sup>18</sup> “It is not only the case that, say, better basic education and health care improve the quality of life indirectly; they also increase a person’s ability to earn on income and be free of income-poverty as well. The more inclusive the reach of basic education and health care, the more likely it is that even the potentially poor would have a better chance for overcoming penury” (Sen, 2000, p. 90).

<sup>19</sup> Nussbaum has argued in favor of this, saying there are links between education, critical thinking, arts, and teaching/learning processes. Nussbaum quotes a beautiful episode to support that assertion: “Playing both male and female roles themselves, the girls told a story of how one young woman refused to be given in marriage with a dowry. Her parents were shocked, and the prospective groom’s father became furious. After much discussion, however, including a description of how dowry is linked to the malnutrition and death of girls and the murders of adult women, the groom refused a dowry. He stood up proudly against his father—and the tall girl playing the groom stood up all the more proudly. Eventually, even the two sets of parents agreed that the new way was better. The marriage took place, and no money changed hands. Teachers told us that the whole village came to the play and thought it did some good.

in commodity production” (Sen, 2000, p. 293). Granted: education has to have a payoff in the sense that it must be relevant in helping people make a living. But education is also about ensuring people can discover what they can do in non-beforehand-decided ways. If the future is open and uncertain, our abilities to deal with openness must be reinforced by educational programs that are less interested in knowledge and curriculum and more focused on learning from questions and problems raised in material scenarios, real challenges, and social opportunities.

## 5. Education and social opportunities

Education promotes efforts to uncover nature’s secrets, to investigate how humans have become what they have become, analyze concepts and theories, reflect critically on what is worth doing and being, etc. Besides, education contributes to qualifying professionals with essential abilities in specialized economic processes and demanding labor scenarios. Generally speaking, education helps us find out what kind of societies we want to live in by understanding our world. Furthermore, education gives reasons for seeking to know as much as we can about others and how they live and in which conditions, and what we can do to engage with them to ensure better lives for everyone. Finally, education empowers individuals to break free from poverty, deprivation, illness, violence, and other constraints that can determine similar destinies for us.

Let us say it makes sense to claim that education is about creating and expanding human capabilities—something profoundly problematic because it represents a controversy about what will produce the most comprehensive understanding of the world and the most genuine human lives (Berlin, 2000, p. 262). But it cannot be assumed that education automatically promotes people’s capabilities and well-being. Indeed, external material conditions affect what we can do and be. Having nurturing resources, people can expand their agency. That means people need real access to education, health, work, service facilities, bodily integrity, and public participation as opportunities to enjoy freedoms.<sup>20</sup> It is crucial, at the same time, to transform those

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Meanwhile, the girls giggled with pleasure at the subversive entertainment they had cooked up” (2006, p. 386).

<sup>20</sup> There is a debate about whether there is a finite number of capabilities as a cross-cultural set list (Nussbaum, 2011), in contrast with the idea that the

resources and conditions into tangible actions. *Fundamental capability failures* are about choosing possibilities of action and making them real as concrete activities (Sen, 1992, pp. 109-111). Potential intentional choices are not the same as performed actions. Possibilities of action represent just formal presumptions if people do not translate those possibilities into practical activities (working, studying, eating, having shelter, etc.). That idea is profoundly convincing regarding education.<sup>21</sup> Let us now consider it in detail.

Access to education is essential, but having material conditions of growth is what “makes magic”. People need education, but they also need opportunities to make what they have learned real through education. That means people need to turn their capabilities into actions within environments prepared to give them options to perform those capabilities adequately. The “socio-economic position of children’s, adolescents’, and young adults’ families of origin affects children’s, adolescents’, and young adults’ educational trajectories and outcomes” (Lucas & Irwin, 2018, p. 74). Education is just about gratuitous enlightening if people cannot act on their knowledge, values, and priorities, and have socio-economic opportunities for improving their lives. *Combined capabilities*: by highlighting what people can do and the significance of actual external conditions for people acting accordingly, our understanding of education as a requisite for human development (i.e., social requirements for capabilities) is completed. Mixing education and social-opportunities concepts allows us to emphasize that it is necessary to consider both the increasing poverty levels and social, gender, and racial inequalities in Latin America (Walker & Unterhalter, 2007, pp. 10-11). Moreover, thinking about education goes further than

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capability approach incarnates a theoretical framework for public and localized discussions about what capabilities count as valuable (Sen, 2004). We mention some of the items debated regarding that discussion context without suggesting those are the main items on a separate list.

<sup>21</sup> “[...] I thought, ‘How can even a successfully reformed urban school benefit a low-income student of color whose graduation will not lead to a job on which to make a living because there are not enough such jobs, and will not lead to the resources for college completion?’ New curriculum, standardized tests, or even nurturing democratic small schools do not create living wage jobs and do not provide poor students with the funds and supports for a bachelor’s degree, which could make a significant difference in their lives. It seemed to me that we must change these political/economic policies” (Anyon, 2011, p. 58).

thinking about curriculum designs and research activities related to teachers' practices and methods. Considering education as the main subject of critics and solution reflections at the level of state politics allows us to highlight social injustice and people's living conditions. Intensifying that viewpoint is strengthening our attention to people's scenarios instead of merely focusing just on pedagogical debates, administrative discussions, and institutional principles—all of which may be essential issues but they are insufficient in thinking about improving human beings' lives and education.

Land, schools, teachers, houses, roads, and healthcare have been demanded in Latin America. We are used to listening to calls for liberation, benefiting and helping people experiencing poverty, paying attention to rural workers, democracy, liberty, peace, security, happiness for all, etc., without meeting concrete solutions (Hobsbawm, 2016, p. 514). Those calls have often been voiced by people of different origins. In Latin America, the rich get more prosperous, and the poor are more impoverished. Think of an anecdote—from July 1963—told by Hobsbawm about his travels in Peru, during which he was told by a local: “You see, there are two classes. One has nothing, the other has everything: money, power” (Hobsbawm, 2016, p. 626). Such an anecdote depicts social injustice, the feeling that things have been hard for many people who have not had real growth opportunities (Hobsbawm, 2016, p. 849).

An old but unanswered question has been asked many times within historic diagnoses in Latin America: how can political and socio-economic growth be created without reducing expectations for reaching equity? Simply said, how can development and equity be achieved simultaneously? Public policies can promote both, scholars usually assure (Reid, 2007, p. 14). According to them, indeed, education is one of the best public policies, meaning investments in promoting coverage and quality of education will have results in creating combined capabilities. Education is about hope, but trying to explain that is a difficult task if we want to avoid romanticism and naiveté. From peasants to bandits, from intellectuals to politicians, from parents to young people, it is possible to find expectations in Latin American history about how education represents ways of making things better for all. But saying is easier than doing it; various contemporary institutional models—produced by years of experimenting with public policies—attests to that difficulty (Torres & Puiggrós, 2018).

Combining the notions of “education” and “social opportunities” is helpful because it highlights how important it is to guarantee material conditions for human development. There are, indeed, vigorous debates about the positive relationship between education and economic, political, and cultural development at the level of social change. It has been supposed that it would have powerful effects. Yet, although a traditional confidence in education is essential in the global blueprint for development, it is not clear how—and to what extent—education affects human lives.<sup>22</sup> There are, in fact, innumerable and widely disseminated debates in Latin America about education as an investment in human development in terms of increasing the productivity of labor, improving scientific and technological inventiveness, and supporting socio-economic and political mechanisms.

Additionally, emphasis on education leads us to characterizations of circumstances and contexts of action involved in the idea that any human pursuit involves an affordance structure and capabilities development (Gallagher, 2020, pp. 12-17). More is needed to recognize redundancies between education and development. Paying attention to education is conceptually relevant because it highlights the human and material conditions for improving lives. Because of that, insistently saying “Education is not just about information” is very important. It is essential to say that education is not just about technical training programs and that it is not just about professional demands—i.e., the curriculum’s idea (Leadbeater, 2012). Education is about growing capabilities that are not separated from the situations in which human beings interact. Education is pragmatic in such a way that activates

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<sup>22</sup> “Our assessment of the literature on education and development leads us to two general conclusions. First, there are many gray areas regarding the evidence on the links between development and education. Sweeping assertions regarding the positive or negative effects of one on the other miss the mark. This is slowly but steadily recognized in a call to move beyond the earlier either/or formulations and attempts to delineate the conditions under which development and education links are most likely to occur. [...]. However, the second general conclusion is that much confidence in the positive ties between education and development persists in the development practitioner literature and public discourse about education and development. Sociological attention needs to be directed to the power of the taken-for-granted, that is, to the institutionalization of diffuse beliefs, practices, and routines regarding the links between development and education” (Chabbot & Ramirez, 2000, p. 164).



performances and sustains action possibilities in humans in need to discover how to manage material difficulties. When understood within the capabilities approach, education becomes richly ambiguous because it belongs to the individual and collective development and shows sympathetic respect for new forms of living, which usually present creative solutions to complicated realities.

## 6. Final remarks. The crisis of educational systems

As mentioned before, education has a role as a social leveler. For the capabilities approach, it is through the educational process that the minimum conditions are guaranteed so that people can enjoy their lives and achieve the life they consider valuable. Education, in its most basic sense, implies linguistic and mathematical literacy; for Nussbaum and Sen, these minimums ensure people's access to the universal heritage of knowledge. In this sense, formal primary education reduces social gaps and is governed by a criterion of equality. Given that education plays a decisive role, society must guarantee universal access to it. Education ensures minimum conditions and is the tool through which people's conditions are leveled, becoming a condition for attaining fairness.

As a byproduct of this role as a promoter of equity, educational processes bring learners closer to possible worlds, different points of reference, and experiences that broaden their reality. We all have the right to increase our knowledge and expand our perspectives and visions of the world. Education makes it possible to consider realities that are neither evident nor visible in everyday life (Nussbaum, 2000). In this way, education offers diverse life projects, and through it, individuals open their minds to alternatives and worlds of possibilities. This role is undoubtedly central to ensuring people's choices by expanding the paths of possibility, which is why it becomes a cross-cutting point of the capabilities approach.

In addition to this leveling role, education transmits values or essential social-contract ideas, such as the principles of democracy and pluralism. In this sense, education is understood as a "transmitter" of a body of knowledge, notions, and agreements essential to a liberal vision. According to the capabilities approach, this democratic framework is an inescapable point of reference for creating a society in which to live the desired life. An example of this is the direct relationship that the capabilities approach establishes between education and justice, understanding education as a tool not only to reduce inequalities but also



for critical thinking and distancing oneself from hegemonic positions, especially when these, despite being endorsed by the authority of current institutions, could justify an unjust treatment of less favored populations or individuals. So, the agency and choice proposed by the capabilities approach are possible within a framework of essential values of a democratic nature that are disseminated through education.

The capabilities approach emphasizes the centrality of individual agency. In this framework, education plays a vital role in developing specific mental abilities and skills that allow people to undertake cognitive operations linked to evaluation, decision-making, and the exercise of agency. Again, Nussbaum's debt to Aristotle is evident on this point. Reflection is critical since it is through examination that it is possible to put one's own experience in perspective and generate inductions and deductions that allow one to reach one's own opinion.

To this extent, education's purpose is to develop critical competencies that guarantee correct deliberation by individuals and, therefore, a good decision-making process. Thus, education fosters the ability to ponder different points of view through dialogue and contact with others, and it should lead the learner to opt, in a reasoned manner, for one of them. Finally, education should bring subjects closer to their own choices, motivating them to recognize and learn what they derive from them. Given that the capabilities approach requires people to constantly evaluate which decision is the most convenient and aligned with their expectations, it is essential that they can perform cognitive-emotional operations that the educational process facilitates. Thus, a central role of education is to develop skills related to reflection on experience, deliberation, choice, and selection.

Education, under the capabilities approach, ensures, in addition to specific cognitive-emotional skills, a liberal framework of reference. These two aspects allow, in turn, to defend that education has, on the one hand, an instrumental character and, at the same time, an aim tied to the ideals of a democratic society. Indeed, the proposed education also has a transformative character in that it modifies or broadens preferences and allows the evaluation and choice process under new paradigms.

The central point lies in freedom, which enables the exercise of thinking about alternative scenarios in which, for example, practices of power and hegemonic positions are transformed. Freedom and the search for justice, as democratic referents, ensured through education, favor the sphere of social change. Thus, when we have received this

type of education, we are prepared not only to enter democratic games and roles but also to denounce everything that signifies an exaggerated or excessive use of power. This emancipatory character of education is perhaps the most provocative point of this proposal, since it implies accepting an eternal tension between education as a reproducer of accumulated knowledge and as a mechanism for the preservation and protection of known truths and, at the same time, as a platform of dispute and criticism of established truth.

It is worth asking whether formal education nowadays promotes this emancipatory spirit. Observing formal educational proposals, it seems that they concentrate on replicating or perpetuating the framework of reference of liberal principles without paying attention to or guaranteeing any emancipatory character. Thus, education today tends to be more instrumental than transformative. In general, and despite the efforts of the educational world to design alternative proposals to rethink reality and invite learners to question the world in which they live, there are very few cases in which genuine innovations come from the formal sphere of education.

Instead, in many cases, proposals from outside the confines of formal education are relevant for innovation: some of the most challenging trends have been incubated outside institutionalized educational centers. As a reproducer of already consolidated knowledge, processes, and discourses, the school only seems to embrace transformations and innovations when these have already been tested. Thus, despite incorporating new trends, formal education focuses on replicating facets and abandons the challenge of formulating new educational approaches or paths. To this extent, as various theorists have argued, formal education is in crisis and does not respond to the need for change.

Contrary to the transformative spirit demanded, education has been much more effective in meeting the needs of business and industry. It has focused on producing human capital tailored to their demands and generating efficient mechanisms to respond to market challenges. Current education thus nullifies alternativity and the possibility of deciding one's life project, as proposed by the capabilities approach. Education, which should be an instrument of freedom, is currently portrayed as the terrain in which the subject is condemned and enslaved following the rhythm of the production and generation of capital.

Nevertheless, this relationship between education and the market also hangs by a thread, as is shown in the case of professionalization.

Indeed, in the contemporary world, society has begun to economically and socially reward people who have not had a classical educational “itinerary.” The emergence of new social roles and jobs associated with interaction on social networks (YouTubers, influencers, gamers) challenges the idea that education guarantees a better future, at least when it comes to income and recognition. The same happens with the precariousness of certain liberal professions whose practice is subject to market laws, such as medicine or law. The desire to have a “respected” and “well-paid” job is becoming less and less of an incentive for social groups and, with it, the desire to access higher education and pursue traditional careers to achieve these goals.

Thus, as an example of formal education, university-level higher education seems doomed to failure. Indeed, as the market demands professionals with a specific education, education bows to these needs, abandoning its emancipatory power. Moreover, now that career options that do not require formalized education are emerging, education anchored to the market’s needs loses its meaning. In this tacit agreement with the market, education did not seek to change the world but to respond to the market’s demands. It required a type of professional that the market rewarded, so formal education was valued. However, this professional training is now precarious; they need to be more economically and socially rewarded, and the life project associated with success is distanced from professionalization. The self-taught emergence of new occupations, such as those in Silicon Valley, shows that remuneration and success no longer depend on formal education. The marriage of education with the system has finally eroded.

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