



# Democratising Participatory Research

*Pathways to Social Justice from the South*

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## 5. Co-Researchers' Valued Capabilities

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My story is different because it speaks on the basis of my personal narrative, which I have developed over the two and a half years of having been a university student. My narrative also touches on the years of my life prior to the University of the Free State. How I have made sense of my world as a black individual in a post-apartheid/so-called democratic country, how I make sense of the world as a gay man in a homophobic and queerphobic space and finally how I make sense of the world in a capitalist/economically oppressive and corrupt system as a poor human being.

Power and inequalities have always been and remain a part of my daily life at the university. I have recently learnt that in the examination of inequalities, it is crucial that I equally evaluate my own position of privilege which might directly or indirectly cause me to be powerful and therefore, oppressive to others through my actions. I have been oppressed all of my life. I have been a victim of the abuse of power that was used to make me believe that I was less than and obviously less than all human beings. I will take you through the experiences mentioned above in which power and inequalities were dominant in my personal life as a black, gay, poor, and relatively oppressed person who is now a student of governance and political transformation at the University of the Free State. Due to the fact that this is a collaborative book; I will not be too long in explaining much about my life before university.

A series of my early childhood memories involve my uncle constantly beating up on me and very aggressively telling me to act like a boy, because that is what I am. This to me was not always clear, I did not always understand what it meant but I could tell that I acted a bit different, maybe a lot different from my brother and I preferred to play with my mother's bags and wore my sister's clothes. I was around three or four years old. My uncle would beat the hell out of me to such an extent that I could tell that my mother was in more pain than I was. Although my uncle died around that time, over the years I have met many of his duplicates. I have met him many times that I can recall. I see him in the

people who, in my everyday life make it a point to communicate it to me that my sexuality is unacceptable. I met him in kids and teachers in school who would remind me that I needed to act a certain way because I was just a bit too soft for a boy and my association with the girls was just disgusting. I met him in my grandmother who would call me all names under the sky, which taught me that in actual fact, I was gay and that wherever I go in life men will always beat me up, because I am not man enough. To cut the long story short, I still meet him every day in homophobic, angry, ignorant people who are so convinced that my sexuality is of a sinful nature.

University for me has not always been a transformative space, but I appreciate the movements and the eagerness to fight for what we, as the students, believe in. It was events such as the protest that followed immediately after Shimla Park and Fees Must Fall that encouraged me to act upon my own conditions about my sexuality. I started engaging in many conversations with queer bodies, trans, gay, lesbian, etc., most of which I had met in student activism for (falls) and protests against racial oppression that we had experienced here.

In all of those encounters, I gauged a necessity to start vocalising our own experiences as far as our sexualities and bodies were on the line during the protest whilst even in spaces of activism, we remained victims of queerphobia and hatred from our cis heterosexual counterparts. There was not much confidence in me, although I understood the need to start speaking about the problems. Through a student movement that had been established to vocalise black student voices, we could create a fully operational structure on which we could rely to speak about race issues. We discussed at one of the movement's meetings that we needed to start to vocalise all sorts of injustices including those imposed on the LGBTQI community. The aim was to create the space to be inclusive and, if at all, not oppressive in any way. I do not speak on LGBTQI issues because it is enjoyable but because it is my duty to create that consciousness and expose the norms we have been socialised to adhere to as society.

University should be a transformative space where we are able to stand for something and literally when we leave this place we need to leave with ultra-perspectives. University as they say is a microcosm of the extended society but if we start to inject a sense of positive influence and challenge the myths we have been told about other people, and if we start to channel our minds for change at this very stage, then we will not have to worry about corrective rape or the escalating statistics of the killing of queer people in our country.

Nevertheless. I most certainly am proud of the progress that the country has made. I could not imagine not having access to facilities and intuitions by virtue of being black, for instance. It is perhaps a blessing

and a curse to be living in a democratic country, more than merely a curse, or is it really? And is it as democratic as we claim?

Political power at the current moment is held by very selfish, greedy and power-hungry patriachs. The economy, which also translates to opportunities for black people to make a stable, decent income, and issues such as land are still held in the very same hands. There are still loopholes in many of the county's policies in regard to the latter. Privilege and power instruments prevail in the hands of the fortunate. I live in a country where even though we had made improvements here and there, I am exposed to many perspectives of the scope of economic (freedoms) and economic liberations. One is my hometown, where the positionality of young people remains hopeless. The problematics range from the lack of the establishment of opportunities and giving youth the instruments to create opportunities and income in the form of skills development. The irony of this opinion though is, of course the breathtaking statistics of unemployed graduates in townships like Umlazi. Which makes me wonder what the future holds.

I equally am exposed to a part of the country where some of my classmates come from massively rich, middle-class backgrounds with a solid private education. We can argue the obvious; ours is a weak and flawed education system but that gives no mercy when I have to compete academically at university level. Does that not also guarantee that I cannot be certain about quickly finishing my degree on time and get a well-paying job, move to a better class community and finally money?

Money is a huge part of my life in university. My very being on campus requires a certain amount of payment per year. But I want to reflect on the subjugation of black, poor students to the lack of funding. My story is not representative of the entire black, poor student majority but we certainly do share sentiments when it comes to the subject.

My story begins when I found out that I had been accepted to the University of the Free State but the person who told me this exciting news told me I had not qualified for financial aid. I discussed this with my aunt who offered to make a few basic payments from the investments she had made over the years. I took a bus the following day from Durban to Bloemfontein, with a few thousands; a few for registration, a few for rent and less than a thousand to start my life. I had made it a mission of mine to get here and find whoever was responsible for financial aid and beg them to give me money to study. In my first few months, I relied on my aunt (the sole breadwinner) for money. Fine. But I mean, it was quite a load for her as she had to support three other people in my family who were also at institutions of higher learning. So, I still needed aid. I was told to attend classes in the meantime and not worry about fees. I remember getting a call from my biological mother who is unemployed

to just return home and see what I could do with my life after she had broken the news that my aunt had lost her job in February, after my arrival in Bloemfontein in January. At that time there was no other person to help me out with regards to paying for me. My life was too expensive, I was away from home and I had no idea where I was going to get money to pay for my studies. The following day, I went and looked for the SRC offices and met a girl who did not promise anything but said she would try to get me funding. We struggled together as I went to her office. She called people every day in higher offices on my behalf asking for funding without success.

I struggled with funding throughout the course of my first year and nothing was working. I had a diary that I had gotten during registration that had all the contact details of the rectorate and the SRC. I started to email all of these people repeating my story on every single email, basically begging for funding. I sent everyone and I was either getting negative feedback or no feedback at all. I contacted companies, organisations, and people that I had Googled and that too was unsuccessful. Later that year (2015) I received another call from home that would change the rest of my life. My cousin had called to tell me that my aunt passed away. Of all the devastation I had gone through fighting to be at school and being determined not to leave Bloemfontein, it all seemed to have been a waste of time. I suffered from depression from both the loss of a loved one and the fact that I had absolutely no money to go on. I survived the rest of the year staying in a residence that I had found on the assistance of Mosa Leteane and the then Dean of Student Affairs, Cornelia Faasen. I finally received funding from the university in 2016 for both my first year and my second year, after a very long time of begging and struggling. Financial aid came through after that and saved the day.

My story is not really special but it is a story that does two things. Firstly, it reflects on the sense of urgency that is needed to ensure that funding models are implemented to address the issue of deregistration and the number of students who drop out every year due to the funding obstacle. It also brings light to the level of trauma and depression that we end up having to suffer within this space. Honestly, we are not fine and generally students are not okay mentally, not even because of academics, but with all the challenges that are entangled around having to survive university. We can further argue that depression is not recognised by the university as a disease that many students suffer. In many cases, I sat and imagined that perhaps life would be fine if I had gone home and did not have to deal with my funding and personal problems due to our social inequalities.

## 5.1 Introduction

This chapter is centred around the debate on the universalisation of capabilities—the creation of universal capabilities for all (Nussbaum 2011)—in relation to the evidence that arose from the DCR case study developed in South Africa. Firstly, using a prospective application of the Capabilities Approach, the chapter argues the need to identify the valued capabilities of a group of co-researchers before undertaking participatory practices such as DCR. The analysis is made by exploring the valued capabilities for the twelve student co-researchers in the case study, incorporating the fluid aspect of capabilities and presenting the four central capabilities for this group: Epistemic, Ubuntu, Human Recognition and Self-Development capabilities.

Furthermore, as the argument is to highlight the importance of contextual capability choices, instead of a universal list, Nussbaum's central capabilities (2011) are used to compare and understand their differences. Thus, the chapter argues that despite the contribution made by this universal list to the field of human development, we still have good reason to scrutinise it, as many cultural and contextual specificities—Southern perspectives—can be lost in such aggregations, thereby missing the grassroots potential of the Capabilities Approach. For instance, the Ubuntu capability identified in this group exposes current understandings of care and support from the Global South that in its Western form limits a contextual vision of this freedom. Further, by investigating these contextual factors we can appreciate how colonial conversion factors activate insurgent capabilities against oppressions of basic freedoms.

The final section of the chapter focuses on the actual prospective frame designed by the facilitator prior to the participatory project in this DCR case study. The frame highlights the strategies drafted according to the most valuable capabilities among the group of participants. Moreover, the actual application of these strategies is presented in a tabulated summary to show how the author—as facilitator—applied the different recommendations from the prospective plan during the DCR project.

## 5.2 The Capabilities Approach as a Prospective Frame

The Capabilities Approach can be used not only as an evaluative frame, but also as a prospective approach. Comim, Qizilbash and Alkire (2008) claim that:

A prospective application of the Capabilities Approach, in contrast [to the evaluative application], is a working set of the policies, activities and recommendations that are considered, at any given time, most likely to generate considerable capability expansion—together with the processes by which these policies/activities/recommendations are generated and the contexts in which they will be more likely to deliver these benefits. (2008, 30)

Therefore, a prospective application of the Capabilities Approach to our participatory practice can provide us with a set of recommendations for enhancing capabilities expansion in our research team. In this case I am not expecting this prospective perspective to answer the question of how and why capabilities are being expanded, but rather to produce a set of group-related recommendations prior to our participatory project. Using the Capabilities Approach as a prospective guide for our DCR participatory practices, we ask what capabilities are valuable for this research team, and what strategies can be designed prior to our participatory project in order to enhance them. Once again, citing Comim et al. (2008), the aim of this prospective approach is to find ‘which prospective recommendations could or should arise from the Capability Approach’ (2008, 32). However, these affirmations lead us to pose other questions, such as whether these recommendations are based on capabilities? And if so, which capabilities? Are we to use a pre-designed capabilities list or not? And why? Therefore, before addressing the details from the DCR project, I will argue for the use of a contextual capabilities list in order to enhance the use of the Capabilities Approach under a prospective frame prior to our participatory DCR project.

## 5.3 Preparing Our DCR Project as Facilitators: Precooked or Home-Cooked Capabilities?

As the questions above have highlighted, one of the main questions to consider after having proposed this prospective use of the CA for our

DCR projects is what the focus of our analysis is. Also, if we are using capabilities, which capabilities shall we use? A pre-designed list or a contextual list?

Pre-designed capabilities lists are available within the capabilities literature. Some of them focus on a specific context (Walker 2006) and others are more generic, such as Nussbaum's central capabilities list (Nussbaum 2011). Nevertheless, building from the argument put forward as part of our Southern location, we have good reasons to design our own contextual list in order to offer contextual recommendations for our DCR participatory practice. Indeed, Spreafico (2016) argues that despite the time-consuming and elevated cost of some participatory practices:

Deliberative or participatory exercises are more coherent with the Capabilities Approach as put forwards by Sen (1999). It requires engaging representative samples of stakeholders as reflexive agents in order to capture their considerations over which capabilities matter most. (2016, 10)

Our Southern perspective requires this open-ended version of the Capability Approach (Sen 1999). As Hoffmann and Metz clearly state, in Sen's version of the Capabilities Approach, 'capabilities cannot freeze a list of capabilities for all societies, for all times to come, irrespective of what the citizens come to understand and value' (Hoffmann & Metz 2017, 2). In addition, in line with Bonvin, Laruffa, and Rosenstein (2017), the idea of 'reason to value' for Sen transcends the universalistic misrepresentation of rationality. Therefore, from both perspectives what we need within the Capabilities Approach literature is a more dynamic model which is capable of embracing our cultural and contextual specificities, beyond Western and Northern universal aggregations, which are overwhelmingly applied in the field. Therefore, to further elaborate on these ideas, in the following section I explore the group capabilities list from the DCR co-researchers, in comparison with Nussbaum's capabilities list. The chapter argues that, despite there being some commonalities between these valuable capabilities and elements from Nussbaum, some elements are missing or are presented from different perspectives, and Nussbaum's list appears not to be incommensurable. Consequently, a Southern analysis could greatly expand our available information about what exactly these capabilities

mean for this specific group in the context and time in which they were explored, and why. Moreover, it substantially helps us in the subsequent process of designing our prospective capability plan and fulfilling the fifth principle of DCR, as enhancing valued capabilities.

### 5.3.1 Understanding DCR Co-Researchers' Valuable Capabilities as Dynamic and Contextual

Prior to the DCR participatory project, I conducted individual interviews (of two to three hours) with each of the potential participants. This first interview aimed to identify the valuable capabilities for these students at that time. Hence, although I explored their life stories, much of the interview was focused on their valued capabilities at the moment we spoke, and why they were important for them. Following the individual interview, I dedicated time to designing an individual capabilities list for each of them, basically by giving each valuable capability a title, followed by a brief definition. Moreover, I met with each of the participants again in order to jointly discuss their individual list, in case any changes were required. As a final step, I aggregated all the individual lists into a single common list and this was discussed several times during the course of the DCR participatory project, being more an iterative mutual development than a conventional collection of data.

Despite the difficulties involved in drawing them all together, due to the differences in their lives, some definite categories arose from this process, giving rise to six general valuable capabilities among the members. Table 5 presents the outcome of this iterative analysis of capabilities preferences among the members, highlighting exactly which capabilities were most important for them.

Among the twelve participants, a total of six valuable capabilities were detected: (1) Self-determination, (2) Epistemic,<sup>1</sup> (3) Human Recognition, (4) Ubuntu, (5) Health and (6) Free Time and Leisure. However, various questions can arise from looking at this table, for instance, why these capabilities and not others? Or, why was health only deemed valuable by three of the participants?

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1 This capability was initially named as 'knowledge and Learning capability' but subsequently changed to 'Epistemic Capability'

Table 5: Co-researchers' valued capabilities.

VALUED CAPABILITIES						
	Self-Development	Epistemic	Human Recognition	Ubuntu	Health	Free Time and Leisure
Kungawo	X	X	X	X		
Minenhle	X	X	X	X		
Khayone	X	X	X	X		
Amahle	X	X	X	X	X	
Siyabonga		X	X	X	X	X
Lethabo	X	X		X	X	
Karabo	X	X	X	X		
Bokamoso	X	X	X	X		
Rethabile	X	X		X		
Thato	X	X	X	X		
Iminathi		X	X	X		X
Lesedi	X	X	X	X		
	10	12	10	12	3	2

To a certain extent, this identification and analysis focused on capabilities that they valued highly at a specific time, as opposed to a generic perspective. This reduced the list and made it more focused. It missed out some essential capabilities due to them being valued to a lesser degree at that time, or due to adaptive preferences interacting with their choices (Teschl & Comim 2005). Therefore, in cases like this study, we can observe what I call active capabilities—capabilities that are highly relevant at the time and in the context in which the person is assessing her or his choices. The intention here is not to create a static and permanent selection, but rather to detect those capabilities that are relevant during the period that the team works together.

Hence, all these capabilities preferences seem to be located inside a continuum from 'more active' (highly relevant) to 'less active' (less relevant). The entire continuum is divided by a threshold that allows

the capabilities to become visible when identifying them. For instance, in the top part, we can discern the capabilities that were visible at the time of our discussions. These capabilities are relevant due to the circumstances in their lives—different conversion factors—which affected their choices. In the DCR group, Self-Development, Epistemic, and Ubuntu capabilities were closely related to the age and the situation, as these were undergraduate students working towards their future in South Africa. These freedoms were crucial in allowing them to lead their life in the way they wanted, especially because of the many conversion factors jeopardising them (Sen 1999). Human recognition was mostly linked to colonial conversion factors, in terms of racial structures, which activated or increased the value of this capability for many of them, as the text excerpts at the beginning of each chapter clearly show and the following sections will corroborate.

In contrast to the active space, the threshold, or the passive area, can indicate capabilities that are less important due to the circumstances surrounding the individual—for instance, the context helping them to easily achieve this capability—or due to adaptive preferences (Teschl & Comim 2005). Although all the capabilities identified in this table are open to a more thorough analysis from a capabilities perspective, I here focus only on those classified above the threshold. This is sufficient for our purposes as the process allows us to easily identify the capabilities active at the time of our DCR participatory project in order to design the prospective plan and orient our DCR project towards their valued capabilities. Nevertheless, it is relevant to highlight the insurgent character of some of these capabilities, as seen in those marked in black.

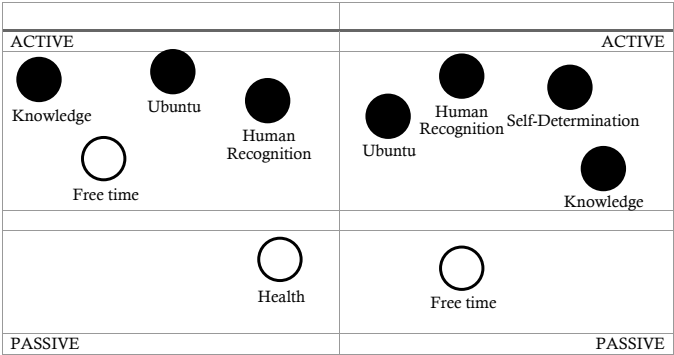


Figure 5: Dynamic and Contextual model of valuable capabilities (image by the author, 2021).

To differentiate between those simply valued or highly valued capabilities within the active space, I use the term 'Insurgent capabilities'. They are central capabilities for these students, however, they are jeopardised by the surrounding conditions. For instance, their Human Recognition is negatively affected by racial structures in South Africa, and their Epistemic capability is constantly negated due to the challenges they face in order to access higher-education institutions in the country and to belong to the hegemonic epistemic system. We can say, then, that insurgent capabilities become active as a response to systemic marginalisation—colonial conversion factors—that characterise the lives of many in a Global South context at specific moments. As the storyteller of the excerpted account opening this chapter said, it concerns how I make sense of the oppressive world in which I live and to which I am subjected:

How I have made sense of my world as a black individual in a post-apartheid/so-called democratic country, how I make sense of the world as a gay man in a homophobic and queerphobic space; and finally how I make sense of the world in a capitalist/economically oppressive and corrupt system as a poor human being.

My reasoned perception of the world and the oppressive structures surrounding me determine my capabilities choices at a specific moment. These choices are not unaltered or intrinsic choices, but rather insurgent choices against an oppressive system that denies my most fundamental humanity and the freedoms associated with it, for instance, the freedom of being recognised as a worthy member of the society in which I live. Although this book aims to present many experiences and capabilities choices, we can say that the overwhelming majority of the group experienced this bias in one way or another, as the coming chapters will illustrate. Even in the best-case scenario, that of being a black, middle-class student on campus, does not totally exonerate you from the negative influence of colonial conversion factors over your freedoms in this context. Thus, insurgent capabilities are better able to explain capabilities' fluid scenarios, preserving the changing dimension of preferences and valued capabilities.

Insurgent capabilities will therefore be related to what are known as adaptive preferences. However, although adaptive preferences might cause adaptations in a negative way, constraining aspirations and preferences, we can argue that the same extreme deprivation can cause

insurgent adaptations against that same oppression (Watts 2009). While the latter talks about the absence of certain choices and thus capability limitations to choose what to value due to persistent deprivation, the former refers to the enhancement of the value of certain central capabilities as a reaction to highly oppressive systems, even if their available choices are fairly obstructed. Hence, even when Sen claims:

Unfavourable social and economic circumstances as well as lifelong habituation to adverse environment might induce people to accept current negative situations. (Teschl & Comim 2005, 230)

This inducement towards acceptance seems to misrepresent what these students would, and do, ultimately choose as valuable in their lives, despite the adverse circumstances. What they have reason to value in a specific moment has much to do with their lived experiences. Further, their repetitive experiences of oppression are able to enhance the value of certain capabilities, as insurgent capabilities in order to overcome contextual 'unfreedoms'. Insurgent capabilities not only support this flexible understanding of capabilities and reaction towards structures of oppression, but also the agentic aspects that play a part when deciding about valued capabilities amidst obstructive circumstances, especially in contexts such as the Global South.

Therefore, coming back to Figure 5, by understanding valued capabilities as situated along a continuum, we can acknowledge the incompleteness of the analysis in terms of choices being adapted or enhanced to the individual's circumstances. These circumstances are constantly moving and impacting students' preferences, as these insurgent capabilities have shown. However, at the same time, we can simplify the complex process of selecting valuable capabilities, by taking into account adaptations or resistances, and focusing on those that are situated in the active area of each individual, as main valued capabilities.

Hence, this framework provides a pragmatic approach, a fluid scenario to easily access categories as active and/or insurgent capabilities for designing the prospective structure of our participatory practices, as will be presented in the following section. In order to do this, what is required is not a precise appraisal of whether these or other capabilities are valuable for a specific individual forever, irrespective

of what occurs in her or his life. What is worth exploring for this case are recommendations (general strategies) to enhance some of the capabilities identified as central at the time of the analysis through the DCR participatory project. This is even more valid when certain capabilities are identified as insurgent, or as essential for the group of participants, due to their reiterated and sustained marginalisation as a result of colonial conversion factors.

### 5.3.2 Comparing Co-Researchers' Valuable Capabilities with Nussbaum's Central Capabilities

This analysis classifies capabilities according to different degrees, which makes capabilities more dependent on the particular circumstances and lives of the individuals, and even more so with insurgent capabilities as reactions to oppressive systems. From a capabilities perspective, scholars may ask why we do not use a pre-designed list, such as Nussbaum's capabilities list.<sup>2</sup> This decision would simplify our work and be extremely time-efficient. However, there are very good reasons to pay attention to the specificities of our participatory groups, due to the fact that a single list might not be suitable for all contexts and all cases (Hoffmann & Metz 2017). In this matter, Nussbaum acknowledges that her formulation of central capabilities is abstract in order to facilitate its translation to contextual implementation (Nussbaum 2011).<sup>3</sup> Nevertheless, it is not only its level of abstraction and intended universalisation, but its own categories, the Western cosmovision underlying them, and their incommensurability, that makes it inadequate for other contexts and situations in the Global South.

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2 Nussbaum's capabilities list has been chosen for its pretension to be universal, because the argument of this study is to acknowledge the cultural differences among capabilities preferences and conceptualisations. To a certain degree, this study could have employed a particular capabilities list, such as some proposed in the area of higher education (see Walker 2006; Wilson-Strydom 2016, among others). Nevertheless, our argument seeks to highlight the inconsistencies of using a universal list, such as Nussbaum's list, above and beyond other contextually related lists, and the importance of agency in capabilities choices.

3 Nussbaum's perspective on the Capabilities Approach is slightly different from that of Amartya Sen. The aim of her intellectual project is the creation of a universal theory, and therefore a universal capabilities list, that can operationalise these capabilities as rights for all human beings.

Hence, in order to illustrate these limitations, this section compares Nussbaum's capabilities with the co-researchers' identified capabilities. The text will then highlight the potential of capabilities to be used as a cultural translation (De Sousa Santos 2014). Capabilities are dependent on the context, culture and moment of life of the individuals. Therefore, they are not static, but rather dynamic, and can be compared with other capabilities lists created in other contexts.

### *Epistemic Capability*

Although it seems simplistic to reduce twelve different understandings of the epistemic capability into one single meaning, there are some fundamental ideas that are common to the group of co-researchers. There were two main ways in which this capability was important for them. Firstly, as an end, mostly related to better understanding and epistemic contribution to the world and the challenges surrounding them. Secondly, as a means to achieve (mainly) financial freedom. Therefore, two contextual claims can be made regarding these two important ways of considering this epistemic capability as dynamic and contextual.

Although both the ends and the means can be related and interwoven, the emphasis on using processes of learning and diverse sources of knowledge to better understand their context and expand their informational basis to make better choices is substantial for this group. Numerous colonial conversion factors that these students experience would not affect other undergraduate students in an affluent European country to the same extent, nor would their understanding of this capability be equal. For these students it is of paramount importance to be able to reason critically and think about the circumstances and the injustices surrounding them as receivers, but also as contributors, of epistemic materials (Fricker 2015). It is also clear that their hermeneutical marginalisation due to colonial conversion factors makes this epistemic capability even more relevant for them, as an insurgent capability. In many cases they are the first generation in their families to access higher-education institutions in the country (Goetze 2018; Mathebula 2019). For them, these colonial conversion factors induce them to an epistemic exploitation, as explained by Berenstain (2016, 572):

The exploitative nature of epistemic exploitation derives from several of its features. These include the opportunity costs associated with the labour of educating the oppressor, the double bind that marginalised people find themselves in when faced with the demand to educate, and the default sceptical responses from the privileged when the marginalised do acquiesce and fulfil their demands.

As the story opening this chapter told us, the decision to become an activist in LGBTQI organised groups on campus is not prompted by leisure, but by an urgent obligation or a demand to educate others. Hence, the enhancement of their knowledge is a necessity, rather than merely an option for this group, due to their epistemic marginalisation. It is an insurgent capability.

Furthermore, this capability seems to have a direct connection with access to resources, especially in terms of job access. Financial freedoms are hugely affected by generations of epistemic marginalisation in South Africa. While three of the twelve students enjoyed a relatively good financial situation, nine of them did not. Nevertheless, they all felt that it was important and necessary to succeed in their undergraduate programmes in order to access a dignified job and achieve financial stability for themselves and their loved ones. To a certain extent, these students had a really clear understanding of how the skills and learning they acquired during their higher education would be able to provide for their families, extended families, friends in need, and for their future selves. For instance, it would be difficult to see this situation in a 2021 Swedish context, in the sense that the individuals' enjoyment of capabilities would not be the same, nor would the conversion factors that impeded their expansion and therefore the reasons to value that specific capability. Hence, although money is considered here not as a capability, but a resource, this good is intimately related to the students' epistemic capability. Thus, for them, the epistemic capability acts as a fertile (Nussbaum 2011; Wolff & De-Shalit 2007) and insurgent capability providing access to resources and reducing the negative effects of colonial conversion factors on their and their loved ones' freedoms. It is a necessary capability for undertaking their Ubuntu and

family responsibilities, or what is commonly known as ‘black taxes’ (Mhlongo 2019).<sup>4</sup>

On the other hand, when comparing this valuable capability for the co-researchers to Nussbaum’s capabilities list, although some similarities can be found, they can by no means be regarded to be the same. The epistemic capability in this group could be linked to one of Nussbaum’s central capabilities, the capability of sense, imagination and thought. Sense, imagination, and thought is defined by Nussbaum (2011) as:

**Being able to use the senses, to imagine, think and reason**—and to do these things in a ‘truly human’ way, **a way informed and cultivated by an adequate education**, including, but by no means limited to, literacy and basic mathematical and scientific training. ~~Being able to use imagination and thought in connection with experiencing and producing works and events of one’s own choice, religious, literary, musical, and so forth. Being able to use one’s mind in ways protected by guarantees of freedom of expression with respect to both political and artistic speech, and freedom of religious exercise. Being able to have pleasurable experiences and to avoid non-beneficial pain.~~ (Nussbaum 2011, 53. Bold and strikethrough in original)

Only the parts that refer to the epistemic capability of the group are marked in bold. In this case, the second part of this capability (which is struck through) falls into the category of human recognition capability of this group, rather than epistemic capability (see the section titled ‘Human Recognition Capability’ below). Moreover, there is an instrumental value of human recognition capability for this group that is missed by Nussbaum’s classification. We can also problematise the notion of ‘adequate education’ used by Nussbaum. Adequate for whom? And where? Are we talking about Western educational standards?

In this case, an appropriate definition for this epistemic capability as defined by this group will be:

Being able to use the senses, to imagine, think, reason and share our knowledge with others and to do these things in a way informed and cultivated by a fair and less oppressive education. This must include

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4 ‘Black taxes’ is a highly debated concept in South Africa and refers to an individual responsibility to contribute to the economic and social freedoms of one’s community, when one overcomes their own financial challenges, usually because other members of the community helped them to achieve this end. (For more information see Mhlongo 2019).

our informal African knowledge systems and fair access to our formal Western education system. Being able to use these knowledges and use them to advance economic and other freedoms for our loved ones and for us.

Hence, as presented above, for these students, success in higher education and acquisition of knowledge and skills that can help them to achieve financial freedom through employment is extremely important, not only for their own lives, but also for their ability to help others. The context of where they live leads them to closely connect knowledge with financial and other essential freedoms, and to regard it as a collective way of understanding epistemic freedoms. Moreover, knowledge for them is more than simply learning in Eurocentric institutions. It is a question of accessing these Eurocentric institutions, but also contributing to them with their own knowledge and their own learning about their knowledge systems, always in fair conditions, due to the relevance of colonial conversion factors. Therefore, although a few of Nussbaum's elements are present in this case, others can be related to the DCR group's epistemic capability through different capabilities from her list, whereas others are missing entirely.

### *Ubuntu Capability*

Ubuntu is perhaps the most interesting case among the capabilities discussed in this section. Twelve of the students valued Ubuntu in terms of helping or supporting others and being helped or supported. However, this Ubuntu perspective went beyond the idea of support, help or affiliation. For them, this capability was framed to some extent by the African metaphysical assumption that '[a] person is a person through other persons' (Du Toit 2004). This concept, which may in some ways be romanticised and exoticised, profoundly shapes this particular understanding of this capability as a way of living with others. For this group, the capability of Ubuntu meant or represented a particular ontological position in which reality is conceptualised through our human interactions by highlighting the importance of 'we' over 'I' (Migheli 2017). As Hoffmann and Metz acknowledge, Ubuntu is the idea that 'we cannot survive on our own, that we are vulnerable creatures in need of others to exist and to become who we are' (2017,

5). Certainly for these students, Ubuntu is central in their lives because they were born in South Africa after apartheid and have experienced the consequences of many colonial conversion factors in their freedoms and the freedoms of those they love. Promoting Ubuntu is the only way to overcome their colonial marginalisation (Gade 2011). This not only expands or contextualises this capability in comparison with Nussbaum's list, but also expands our cultural understanding of its impact on other capabilities, as we have seen in the previous discussion of epistemic capability. It is a question not only of acquiring knowledge and contributing to the pool of shared knowledge, but also of using these epistemic materials to help others and to better our societies and living conditions as oppressed collectives.

For this case, two of Nussbaum's capabilities can be considered to fall under the category of Ubuntu; namely those of emotions and affiliation (but only the first point). Nussbaum defines the central capability of emotions as:

Being able to have attachments to things and people outside ourselves; to love those who love and care for us, to grieve at their absence; in general, to love, to grieve, to experience longing, gratitude, and justified anger. Not having one's emotional development blighted by fear and anxiety. (Supporting this capability means supporting forms of human association that can be shown to be crucial in their development). (2011, 54)

Equally, she defines affiliation—only the first point—as:

Being able to live with and towards others, to recognise and show concern for other humans, to engage in various forms of social interaction; to be able to imagine the situation of another. ~~Protecting this capability means protecting institutions that constitute and nourish such forms of affiliation, and also protecting the freedom of assembly and political speech.~~ (2011, 54. Bold and strikethrough in original)

Therefore, in this case, we would need to aggregate two of the capabilities from Nussbaum's list. However, we would still be lacking the cultural understanding of affiliation and connection with other human beings, mediated by the strong ontological position of Ubuntu. Accordingly, this not only requires us to consider it as important to be affiliated with and assertive to others, but also to be able to understand reality as a continuous interaction between humans—a fully relational reality. Thus, a relational perception of reality merges institutions and agents,

focusing only on humans and their actions to improve and positively influence the lives of others. A definition for this group is:

Being able to live with and towards others, to recognise our intrinsic connections with other human beings and our inseparable condition. Being able to love, care for and help others despite the difficult circumstances, just as we are loved cared for and helped by others to pursue our aspirations.

This cooperative and culturally related perspective might clash with many of the conceptualisations of capabilities produced or influenced by scholars from the Global North, thus influencing our framing of this and other capabilities, as many scholars have claimed (D'Amato 2020; Dejaeghere 2020, among others). Nevertheless, this perspective does not call for another universal way of understanding this or other capabilities, but requires us to recognise the relevance of contextual and cultural features in the way we conceptualise valuable capabilities, such as this Ubuntu capability. Capabilities are our decolonial epistemic foundation and therefore the space for cultural translation. However, this translation cannot be achieved if we do not investigate our diverse and plural cultural spaces and contexts. Furthermore, what we can definitely affirm is that this Ubuntu capability is an insurgent and central capability for these students, given how it has impacted the conceptualisation of other capabilities presented in the list. Moreover, it is a central way to overcome students' colonial conversion factors and their associated marginalisation (Le Grange 2012).

### *Human Recognition Capability*

Human recognition emerged as one of the most highly valued capabilities within the group. Nevertheless, this capability was closely linked to colonial conversion factors concerning their context and how these influenced each of their lives, as can be seen in the chapter's opening stories relating to issues of racism, gender inequalities or economic challenges. Most of the students' lives are marked by colonial conditions, which shape what they value. These students' human recognition capability refers to the minimum recognition a human being deserves in order to become a respected and dignified human being in their society. The students repeatedly report experiencing

discrimination against themselves and in a manner that relegates them to sub-human status. As the author of the story opening this chapter highlights, 'I have been a victim of the abuse of power that was used to make me believe that I was less than, and obviously less than all human beings'. As Mpofu and Steyn (2021, 3) eloquently affirm 'the fight for liberation as a form of social justice is also a struggle for the recovery of denied and lost humanity'.

In many forms, the absence of human recognition enhances its importance, and disables active political participation in a variety of ways. Further, it seems that human recognition, in this case, was linked with voice and political participation, whereas in Nussbaum's case it is not. Two different capabilities from Nussbaum's list are needed in order to frame the human recognition capability for this group. One of these is the capability of affiliation—but only the second point:

Having the social bases of self-respect and non-humiliation; being able to be treated as a dignified being whose worth is equal to that of others. This entails provisions of non-discrimination on the basis of race, sex, sexual orientation, ethnicity, caste, religion, national origin, and species. (2011, 54)

The second is the capability of having control over one's environment—but only the political part:

Being able to participate effectively in political choices that govern one's life; having the right of political participation, protections of free speech and association. (2011, 54)

In the DCR case, control over one's environment (political) was not a separate capability from affiliation (second point). Moreover, using affiliation as the concept that summarises the capability seems to miss the central point in this group, where affiliation is related to Ubuntu capability. Therefore, human recognition is able to embrace the freedom of being recognised and consequently able to participate in political spheres. It means being identified as a worthy member of that group and therefore connecting with others in equal conditions through fair participation. Thus, the DCR capability would look like this:

Being able to treat and be treated as a dignified human being whose worth is equal to that of your oppressor, being able to be recognised by others, and not experience dehumanisation due to your race, sex, sexual orientation, ethnicity, religion and so on. Not having your

essential opportunities to function as a genuine and worthy human being diminished. Being able to participate as actively as others in more privileged positions and to help others to participate and become recognised members despite the unequal colonial structures.

Certainly, the exclusion of many communities in South Africa during apartheid has marked these group-valued capabilities, with their historic past highlighting the importance of better status and dignity but also that of others. Again, this is not only about them achieving or enhancing this capability, but helping others to achieve it, as the Ubuntu capability has shown. It is also important to bear in mind that the capabilities, as conceptualised for these students, are capabilities against a system of oppression; they are capabilities as insurgency, not as the promotion or enhancement of well-being. That is why it is important to use the terms colonial conversion factors and insurgent capabilities in this context, whilst also highlighting that is not about a general aim for equality. It is rather an aim to become equal to their oppressors and the more privileged classes who previously denied them and their community fundamental freedoms and their intrinsic humanity.

### *Self-Development Capability*

Equally, self-development is a valued capability for the group due to historical conditions. In many ways, their aspirations and personal projects are impacted by colonial conversion factors that prevent them from becoming who they want to be. For instance, in many cases these students did not access university the first time that they applied due to their incapacity to pay their fees or to afford the expensive student life. Equally, in many cases they did not access their primary degree choice, and had to decide which degree to study according to the bursaries available to them. Their personal projects are mediated by the little freedoms they enjoy, due to their past (Walker & Mathebula 2019).

Thus, although the capability of practical reason on Nussbaum's list can be associated with this group's valuable capability, the self-development capability is broader and at the same time more specific for this group. Nussbaum defines practical reason as:

Being able to form a conception of the good and to engage in critical reflection about the planning of one's life (This entails protection for the liberty of conscience and religious observance). (Nussbaum 2011, 54)

For this group, self-development needs to be rephrased in a more detailed manner as resistance against hegemony:

Being able to collectively form a conception of the good through your community life, cultural learning, and experiences, besides institutional impositions, to lead your context-valued lives. Being able to do so in a reflective way, critically assessing the social stereotypes and labels that surround your community and you due to your historical past and cultural heritage. Being able to make active decisions about your life in order to lead it in the way your community have reason to value and to help others to do the same. Being able to do so with acceptance, resilience, and optimism due to repetitive adverse conditions for your loved ones and for you. Being able to understand the diverse factors that impede your community and you from leading your valued lives, and to create new collective forms of resistance.

This definition highlights that, beyond the generic understanding given by Nussbaum, there are actually three main constitutive elements for this capability in this case. First, being able to reflect collectively and critically about the life you want to lead, understanding the colonial factors surrounding you, and learning from your life experiences and culture. Second, being able to make decisions that directly enable you to lead the life you want to despite your colonial marginalisation. And third, to do so with acceptance, resilience and optimism. The first point may simply be an expansion of Nussbaum's conceptualisation, however, the second is more focused on the freedom to make decisions, to take action for one's personal project and those of others, as well as on insurgency against colonial structures of oppression. Moreover, the third is culturally focused, in the sense of acting with a specific perspective, as defined by the students with an optimistic and positive attitude, but also collectively. In brief, as well as in other capabilities, self-development requires the incorporation of other cultural elements such as Ubuntu principles, in order to better represent the perspectives and context of this group.

### 5.3.3 Defending a Contextual Capabilities List for Our DCR Participatory Projects

In summary, Nussbaum's central capabilities list can be used to explore whether our group's preferences match them (or not), and perhaps

to further understand 'passive' capabilities for a more detailed or precise way of analysing valuable capabilities. This is due to the fact that capabilities—as argued in Chapter Four—can be used as part of diatopic hermeneutics<sup>5</sup> (De Sousa Santos 2006a, 2006b, 2014). Hence, capabilities can be used as an incomplete epistemic foundation for translating different cultures, e.g. in the case of the Ubuntu capability and its comparison with Nussbaum's capabilities of affiliation or emotions. This does not aim to unify. Conversely, it is more a question of looking for isomorphic elements—elements that are similar or different and can explain their meaning—as I do in this section. Which elements relate to one another, and which do not? Moreover, this analysis expands our informational basis for each capability and incorporates different cultural and contextual specificities that are missed when using universal lists. For instance, we might appreciate the insurgent components or the importance of Ubuntu capability influencing other central capabilities, or being commensurable and interconnected.

Table 6: Comparison of Nussbaum's capabilities list vs the DCR group's valued capabilities.

NUSSBAUM'S CENTRAL CAPABILITIES	DCR GROUP'S VALUABLE CAPABILITIES
Sense, imagination, and thought Control over one's environment (material)	Epistemic (As an end and instrumental to financial and other substantial freedoms, collective perspective)
Emotions Affiliation (1)	Ubuntu ( <i>Ubuntu</i> togetherness perspective)
Control over one's environment (Political) Affiliation (2)	Human recognition (Respect and voice/participation overcoming oppression)
Practical reason	Self-Development (Resilience and positive attitude)

<sup>5</sup> See Chapter Three for more information.

Therefore, although there are similar elements between the two lists, as highlighted in this section and summarised in Table 6, there are some specificities that can be lost if we design our prospective plan according to a general list. The aim of this approach is to develop our prospective framework, but also to advance more contextually-based capabilities that acknowledge the richness and relevance of Southern perspectives beyond global aggregations.

## 5.4 DCR: Theory in Practice

After the identification and selection of valued capabilities, the next step is to understand how a prospective framework can be designed. How did this specific framework for the DCR project look, and how was it implemented? The first section here explores the DCR framework, which is divided into three categories: (1) valuable capabilities, (2) main consideration for that specific capability, and (3) strategies to be implemented during the project.

### 5.4.1 DCR Facilitator Framework

Of the six capabilities that arose from the data, only the capabilities that were relevant for six or more of the members were selected to construct the prospective framework of the project. The prospective capabilities plan was built over three categories in a deductive thinking process. First, the principal capabilities for the strategy—those considered as highly important by six or more members of the group—were selected. Second, these capabilities were divided into the main considerations the students made when referring to them, i.e., in terms of the main constitutive elements that arose from the main capability. And third, specific strategies that might enhance or ‘imperfectly’ achieve that freedom throughout the process were considered. These strategies were especially guided toward actions that the researcher—the facilitator—could realistically undertake when working with a DCR group. Hence, Table 7 presents the detailed prospective framework for the DCR project according to the co-researchers’ valued capabilities.

Table 7: DCR case study prospective framework.

CAPABILITY	MAIN CONSIDERATIONS	STRATEGY
1. EPISTEMIC	1.1. Formal knowledge	1.1.1. To provide spaces to explore together how scientific/Western knowledge is produced.
		1.1.2. To use the project to enhance useful skills for their academic degrees.
	1.2. Employability (Financial access)	1.2.1. To provide training in skills that might assist their prospects of employment.
		1.2.2. To provide proof of participation at the end of the project.
	1.3. African knowledge systems	1.3.1. To give value to other types of knowledges.
		1.3.2. To use spaces in the project to apply these knowledges in relation to others and understand their unequal relations.
2. HUMAN RECOGNITION	2.1. Respect	1.3.3. To provide spaces to share our multi-epistemic knowledge among different groups and to be active receivers of these knowledges.
		2.1.1. To balance colonial logics and power structures within the group, enabling the participation of all the members.
	2.2. Voice/Participation	2.1.2. To value every intervention knowing the positionality from where it comes and to use the project as a space to assess these opinions together with respect and love as receivers and givers of epistemic materials despite the social inequalities underlying the group.
		2.2.1. To use positive reinforcement for those who tend to participate less.
		2.2.2. To distribute roles of responsibility to those participants who are less active.
		2.2.3. To create spaces to discuss our different levels of participation and why this happens within the group, due to our localised social positions and power structures within the group.

4. SELF-DEVELOPMENT	3.1. Networks (Emotional support)	3.1.1. To meet with the members outside of the project, in order to create spaces for mutual understanding, friendships and emotional support beyond the project meetings.
		3.1.2. To allow conversations about personal challenges to be taken into account for the group and to work together towards helping others.
	3.2. Networks (Information)	3.2.1. To use alternative communication channels (besides our group meetings) as a way for the members of the group to connect with each other and share information and useful networks.
	4.1. Critical thinking	4.1.1. To avoid simplistic explanations or the presentation of one unique perspective.  4.1.2. To allow and foster different perspectives, in order to assess them together.

This table is a practical example of how a prospective pedagogical plan can be designed for a DCR project. This plan can be a key document for the project and be further discussed with the participants beyond the facilitator's role. Further, it provides guidance for the facilitator in order to enhance co-researchers' valued capabilities, treating the research as a process for capabilities expansion and establishing the threshold by which to assess the process during and after the participatory project.

## 5.5 Conclusion

This chapter aimed to explore how a prospective perspective of the Capability Approach can be applied to our DCR practices, arguing that it actually has substantial benefits and orients our practices towards the collective aims of the co-researchers when situated in the Global South. The first section was dedicated to exploring what a prospective approach within the Capabilities Approach actually is. This perspective presented an analysis of capabilities that can provide us with a set of specific recommendations for implementing our DCR participatory project. Further, the DCR project would be closely related to the co-researchers, following DCR principle number five. However, the second and third sections highlighted some methodological questions. When deciding about capabilities, we need to clarify whether we want to use a pre-designed capabilities list from the literature or whether we want to use our own elaborated list. The latter was defended by comparing the DCR valuable capabilities with Nussbaum's central capabilities list. Furthermore, this has provided evidence showing that although we can look for isomorphic elements—elements that are not necessarily the same, but similar—we still add value with our specific list, especially by highlighting insurgent capabilities and local cosmovisions through the category of Ubuntu.

The final part of the chapter focused on the actual prospective framework designed for this DCR participatory project. First, it clarified how this list of capabilities emerged from the data and the steps taken to reach this outcome. And finally, the prospective plan was presented in a table with three levels: valued capabilities, the main considerations, and strategies for each consideration.

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